



The 2026 Ideabook on Outcome Era

Curated lessons from leaders who are
transforming delivery in the Outcome Era



34 HANDPICKED IDEAS

FROM PROPEL26



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The 2026 Outcome Era Ideabook

34 HANDPICKED IDEAS
FROM PROPEL26



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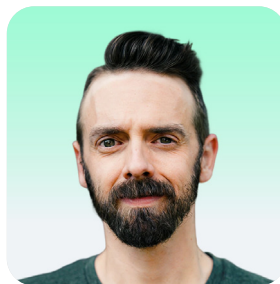

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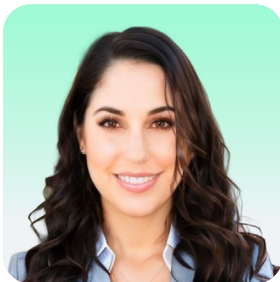

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To all the speakers, industry leaders,
 and professionals who made
 Propel26 a resounding success:

Thank you!

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Preface

Enter the Outcome Era

Welcome to the fifth edition of the
Propel Ideabook.



Five years ago, Propel fit inside one room: a handful of people, a big question, and, as we mention every year, no ice for the water.

This year, 450 leaders gathered in San Francisco, and that number reflects something more important than growth: the questions that professional services leaders are carrying have never felt more consequential or more urgent to answer together.

Since we last met, AI moved decisively from experimentation to infrastructure. The cost of intelligence dropped permanently, autonomous capabilities expanded, and what began as pilots started running in production. Work that once required teams began to require systems, and the assumptions built into how PS orgs operate started to strain under the weight of that change.

But the more significant shift wasn't happening inside the technology. It was happening on the other side of the table.

Customers began measuring something different, not whether delivery milestones were hit, but whether anything actually changed as a result of the investment.

CFOs started asking harder questions, not about time and materials, but about guaranteed outcomes and whether you delivered them. Most PS organizations found themselves in a gap between what buyers now expect and what the existing model was designed to produce.

That gap has a name. The Outcome Era isn't a theme we chose for this conference. It is what your buyers are already living, and what your function now has to rise to meet. Though 'rise to meet' undersells what's on offer.

What's actually happening is a promotion. Enterprise AI doesn't implement itself. The ability to take a customer from the promise your sales team makes to the outcome they actually need is becoming the most defensible capability in enterprise software, for your company and for you personally.

The organizations pulling ahead are rebuilding accordingly: defining success earlier, measuring it more consistently, and using AI to make that scalable.

This Ideabook captures what that looks like in practice. Thirty-four sessions, six chapters, and one question running through all of it: how do you move from the promise your sales team makes to the outcomes your customers actually need?

We hope what follows gives you new language for the shift you're already sensing.

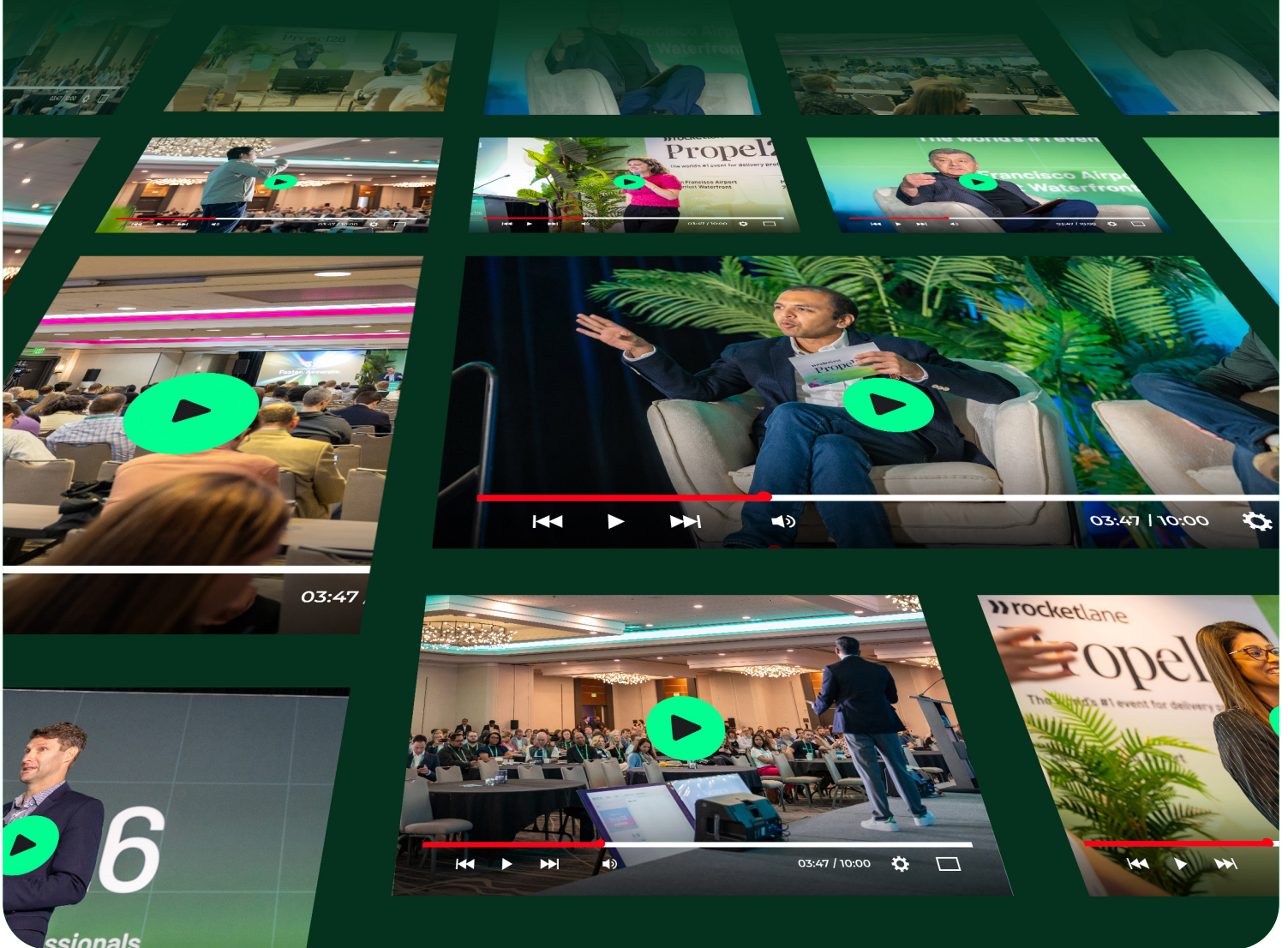
— Srikrishnan Ganesan
CEO & Co-founder, Rocketlane

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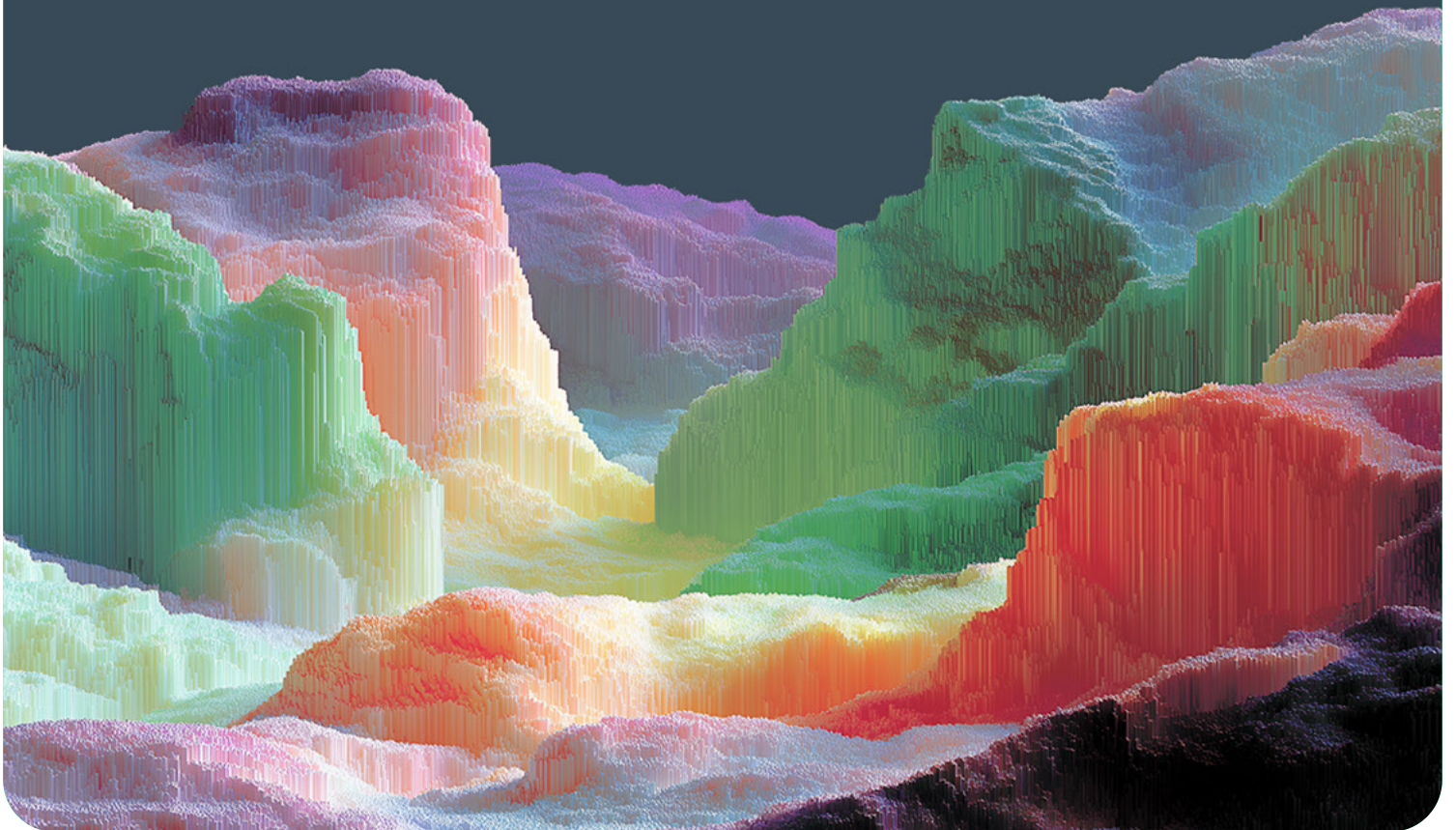
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01

The Modern PS Mandate

Why the Outcome Era demands a
fundamentally different approach



How to let data lead your org transformation



**Eric
Olson**

VP, Customer Operations

onesource
VIRTUAL



**Kate
Brady**

PMO & Consulting Program Leader

onesource
VIRTUAL

OSV was growing fast, but growth was making delivery harder to see. A 40% increase in customer logos and 600+ active projects exposed a deeper problem: six teams were operating with different tools, playbooks, and definitions of project health.

Leaders could not reliably tell where work was on track, where risk was building, or which issues needed intervention. In that environment, changing the org chart first would have been guesswork. But OSV's bet was to create a single source of truth on where every project actually stood before changing the structure around it.

1. Create a shared view of the work

Most orgs reorganize first, then adjust the tooling. OSV reversed the sequence. In four months, OSV onboarded 85 people onto Rocketlane using shared stages, shared fields, and one definition of done. That gave leadership a single view of reality; structure could follow the signal.

By full scale: six teams unified, 2,000+ projects running, 61K billable hours delivered.

2. Build the team in waves, not all at once

The transformation needed people who could build on top of the platform, not just work inside it. OSV built that capability in three deliberate stages: a Program Leader drove the platform-first decision, a Program Manager and an internally promoted Technology Creator followed, and the PMO Director came last when scale demanded governance.

Three of those team members built FlightPath: automated risk scoring, AI-driven data quality flags, confirmed payroll go-lives, and weekly PM coaching scores. The platform earned that investment.

3. Coach teams through the adoption gap with data

Everything changed at once, except behavior. Kate Brady named uneven adoption as a predictable phase, not a failure, and built a four-part framework to lead through it:

- ✦ Name it: call the misalignment out explicitly, before it becomes a morale problem
- ✦ Normalize it: tell teams this is expected when change moves faster than habit
- ✦ Navigate with data: coach against what the platform shows, not what feels true
- ✦ Be patient: AI accelerates visibility; it does not accelerate people

The teams that stayed the course came through with an 85 NPS.

Before you change your org chart, ask if you have a shared signal on what's actually happening across every team.

How to build a business case your CFO will approve



**Chithra
Rajagopalan**

Head of Finance



**Intekhab
Nazeer**

CFO



**Aly Khan
Musani**

CFO



**Mahesh
Baxi**

Chief Success Officer
(Moderator)



Most PS leaders who lose an AI budget conversation don't lose it when the CFO says no. They lose it before they walk into the room by treating the meeting as something to survive rather than something to prepare for.

Finance hasn't moved against AI spending; it has moved toward accountability. In 2026, AI budgets sit at the department level, every function justifies spend, and ROI maps back to company goals before anything gets approved. Three CFOs sat on this panel, delivering the same message to PS leaders: we want to say yes. Most of you just don't give us anything to say yes to.

Here is what being prepared actually looks like, from the people who take the call.

1. AI budgets moved to the department level to justify the ROI

In 2025, AI spend ran as a single IT line item with no accountability, free experimentation, and quietly growing bills. In 2026, that's over. Finance has moved AI budgets to the department level, where every function now needs to justify what it's using, why, and what it generated.

Chithra's team found parallel AI projects that are solving the same problem across departments, increasing spending significantly. So they introduced token budgets by department with ROI mapped back to company goals before the spend is approved.

This also gave visibility to other teams on the problem statements that were being solved for across the org with AI, so that there is no need to replicate.

2. Come with the right ROI frame

AI ROI takes three shapes: makes money, saves money, or reduces compliance risk. The CFOs agreed that the headcount reduction narrative is overused and underdelivered. Aly advises hiring

slowly instead. Defer the next hire and let AI absorb workload growth before adding headcount.

Aly's support team wanted to invest in Glean. They pitched it against a specific outcome, handled growing support volume without adding headcount, ran a pilot, proved it worked, and earned the investment. That's the model.

3. Be ready for the "What problem are you solving?" question

PS leaders arrive in the CFO's office with commitment and no business case. The first question, "what problem are you solving?", stops them cold. Don't ask for a tool budget until you can name the specific problem it solves.

Understand what a CFO is accountable for: gross margin, GRR, NRR, board reporting on spend. Build your case in those terms. If you come partway down the road, the CFO can help you write the rest.

Before your next CFO conversation, write one sentence: the problem you're solving and how you'll measure success. If you can't, you're not ready for the meeting.

How to stop bad patterns from compounding across your org



Ankit
Sobti

Co-Founder & CTO



Every leader knows that good things compound. Almost no one is watching what else is.

Ankit Sobti spent nine years building Postman from the inside, then flipped his role to face customers directly. Suddenly, he could see what had been invisible before: workflows spreading on wrong assumptions, compensation plans forming around them, selling motions calcifying on top.

By the time you realise that the founding assumptions wrong, rolling things back is harder than building them was.

So, here are the three things Postman is building differently as a result.

1. Build PS before FDE, and keep them deliberately separate

Postman built PS first, then a forward-deployed engineering team a year ago, and kept it deliberately distinct. PS solves delivery. FDE hunts for hard problems, applies the rule of three, finds at least three customers with the same pattern before productizing, and feeds solutions back into the product. It's an R&D mechanism.

Start small, create visible results, and argue on the merit of the customer problem, not the org structure.

2. Build all three layers of agentic readiness

Ankit's framework for agentic readiness:

- ◆ The agent layer (platform, model, architecture)
- ◆ The data and knowledge layer (institutional knowledge locked in meetings and people's heads, systems not yet accessible to agents)
- ◆ The action layer (the APIs agents need to actually do anything).

Most teams focus on the first. The data layer is consistently the bottleneck. All three have to be ready together, that's what separates an AI experiment from an operating model.

3. Build agent-ready knowledge bases

Systematically build knowledge bases for both institutional knowledge and API capabilities. This ensures that agents are "grounded" with the right context and can transmit organizational action consistently.

Before you scale any AI workflow, build enough observability into your organization so you can analyze it and then reverse-engineer where it came from.

How to keep the outcome from getting lost between sales and delivery



Ali
Meyer

Founder



The most dangerous implementation failures do not always look like failures at first.

Ali Meyer once led a project that seemed on track but was missing the outcome it was meant to deliver. The client had funded it to automate away an entire department, but that goal never made it into the SOW. So Ali's team took requirements from the very people whose manual work was supposed to be replaced and built features that preserved the old process instead of solving it.

That moment became the failure Glossa was built to fix: the gap where business outcomes vanish between sales and delivery. Ali's answer was to protect the "why" at every step.

Here is her three-step framework for fixing project delivery.

1. Define the outcome before anyone writes a requirement

Sales conversations are about ROI: revenue gained, costs cut, problems solved. By the time the SOW is written, that conversation has been translated into features. By the time delivery starts, the features are all that's left. No outcome, no anchor, no way to stop scope creep.

A well-defined outcome has three things: a baseline value, a target value, and a financial impact- how this saves, protects, or makes money.

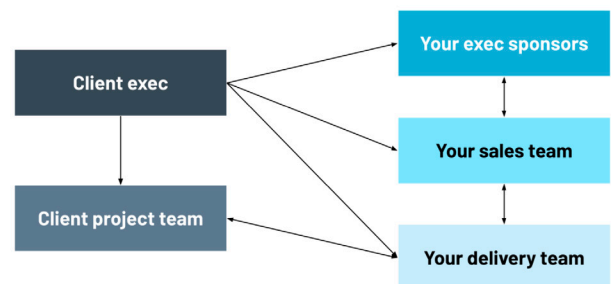
2. Align the outcome across everyone who touches the project

Defining the outcome isn't enough if it lives only with the executive sponsor. The architect designing the solution, the project manager running the implementation, and the client team making day-to-day decisions all need to understand the same outcome.

You need to remember to translate, not transmit. Explain it in the language of whoever you're talking to, not just repeat what the exec said. Document it. Come back to it frequently. People forget and renegotiate. The written, shared outcome is the only anchor that holds.

3. Tie every requirement to an outcome, or cut it

One hack to restrict a scope from ballooning is to ask yourself if the requirement fulfills one of the outcomes you sought to achieve. If not, it's a candidate for removal. Applied consistently, this builds repeatability not in features but in outcomes and the mechanisms that deliver them.



On your next active project, write the outcome down with a baseline value, a target value, and the financial impact. Share it with everyone before requirements gathering starts.

How to lead organizational change without losing people along the way



**Whitney
Eskenazi**

Manager,
Implementation Services



**Kristen
Ware**

Professional Services
Program Manager



**Happy
Luther**

Founder
(Moderator)



Most change initiatives fail not because the solution is wrong, but because leaders act before they fully understand the problem.

Kristen Ware saw that risk at Submittable when the company switched platforms two months before its subscription ended. She thought she knew the scope, but a post-merger setup with four products, multiple teams, and no shared process meant every conversation surfaced new dependencies and new people. Whitney Eskenazi also saw the same pattern at LogicGate.

Both found that how you enter a change determines whether it holds. Here is the framework Kristen and Whitney used.

1. Go in with curiosity, not conclusions

The teams you've worked with longest are the ones you're most likely to misread. You develop assumptions about what the problem is. Kristen's process is to test those assumptions explicitly and go in genuinely open to a different answer. Whitney's parallel experience showed the same principle: one change at LogicGate was chosen by the team and one was forced. The difference in adoption traced directly back to whether people felt heard before the decision was made.

2. Get the right cross-functional people in a room

Kristen formed "Handoff Heroes" — a cross-functional committee of sales, Customer Success, Professional Services, support, product marketing, and revenue operations that meets every six weeks. The first meeting was a brain dump of pain points. People were surprised by what other teams were going through. Whitney's approach started off with individual interviews first, then group, so people hear concerns from each other rather than through a single mouthpiece. Both found the same: the cross-functional room is where assumptions get tested, and decisions stick.

3. Make accountability the linchpin

You can map a process together and still watch it fall apart when no one holds each other to it, especially across power levels. The feedback loop only works when leaders make clear that nothing is set in stone and the goal is to keep refining, but only if the accountability holds.



Before your next change initiative, list what you think you know about the problem, then go talk to three people who will challenge it.

70% of your consultants' week isn't delivery.

It's data prep, chasing timesheets, configuring environments, and updating documents no one reads until something goes wrong.

NITRO

The Agentic Engine Built Into Rocketlane

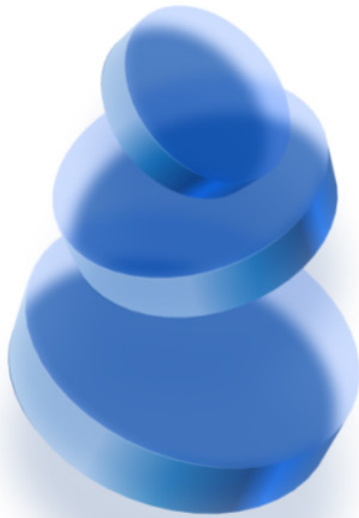
See Nitro in action



Services delivery is entering the Outcome Era. Buyers now expect guaranteed outcomes, not just milestones hit. Meanwhile, engineering teams ship 10x faster and support teams let AI handle 50–60% of tickets untouched.

Services delivery hasn't had its moment yet, not because the technology isn't ready, but because AI has been applied at the wrong layer. Most vendors stop at summaries and dashboards. Nitro doesn't.

We classify AI transformation into three levels, and they are fundamentally different from each other:



LEVEL 1 — OPERATIONS AI

for the people running the P&L. Resourcing, time policies, financial control, governance, the machinery that keeps a services business healthy, running itself in the background.

LEVEL 2 — DELIVERY AI

for the people managing delivery. SOW to project plan in minutes. Governance rules enforced automatically. Risk and opportunity surfaced from every meeting and email — before it reached a status report.

LEVEL 3 — WORK EXECUTION AI

for the work itself. Not planning it, not reporting on it but doing it. Configuration, migration, documentation: the billable work your consultants do with their hands, every day.

More projects have always meant more people. That equation has been gospel forever. Level 3 breaks it.

What Level 3 looks like in a real week

CONFIGURATION

A consultant used to spend two days configuring something that looked almost identical to the last 30 setups. Nitro's Workforce Agents now do it and validate it against what was promised before the customer ever sees a gap. Hours of work reduced to a few minutes.

MIGRATION

Messy customer data used to cost a consultant a week or two of manual cleaning before migration could even start. Nitro's migration agents map, transform, and validate it end-to-end. Preliminary observations are pointing towards a reduction in time of about 75%.

DOCUMENTATION

Discovery calls, scoping notes, and SOWs used to get lost in translation on the way to the delivery team. One customer called it a game of Chinese whispers. Knowledge agents capture everything the moment it's created, bringing the barrier to creation as close to zero as it gets.



The biggest risk isn't just about trying something new. It's really staying in a model that relies on fixing problems after the fact. If you can introduce automation and validation earlier, you're not just improving efficiency, you're improving outcomes."

Jennifer McCurdy,
Senior Manager, Software Implementations
Storable



Free your brain of the details. Let the agents do it for you."

STACEY MILGRAM POTZKA,
VP of Operations & Implementations, Actabl

Let humans do what only humans can do. Let the rest be done by agents, they're co-workers, not competition.

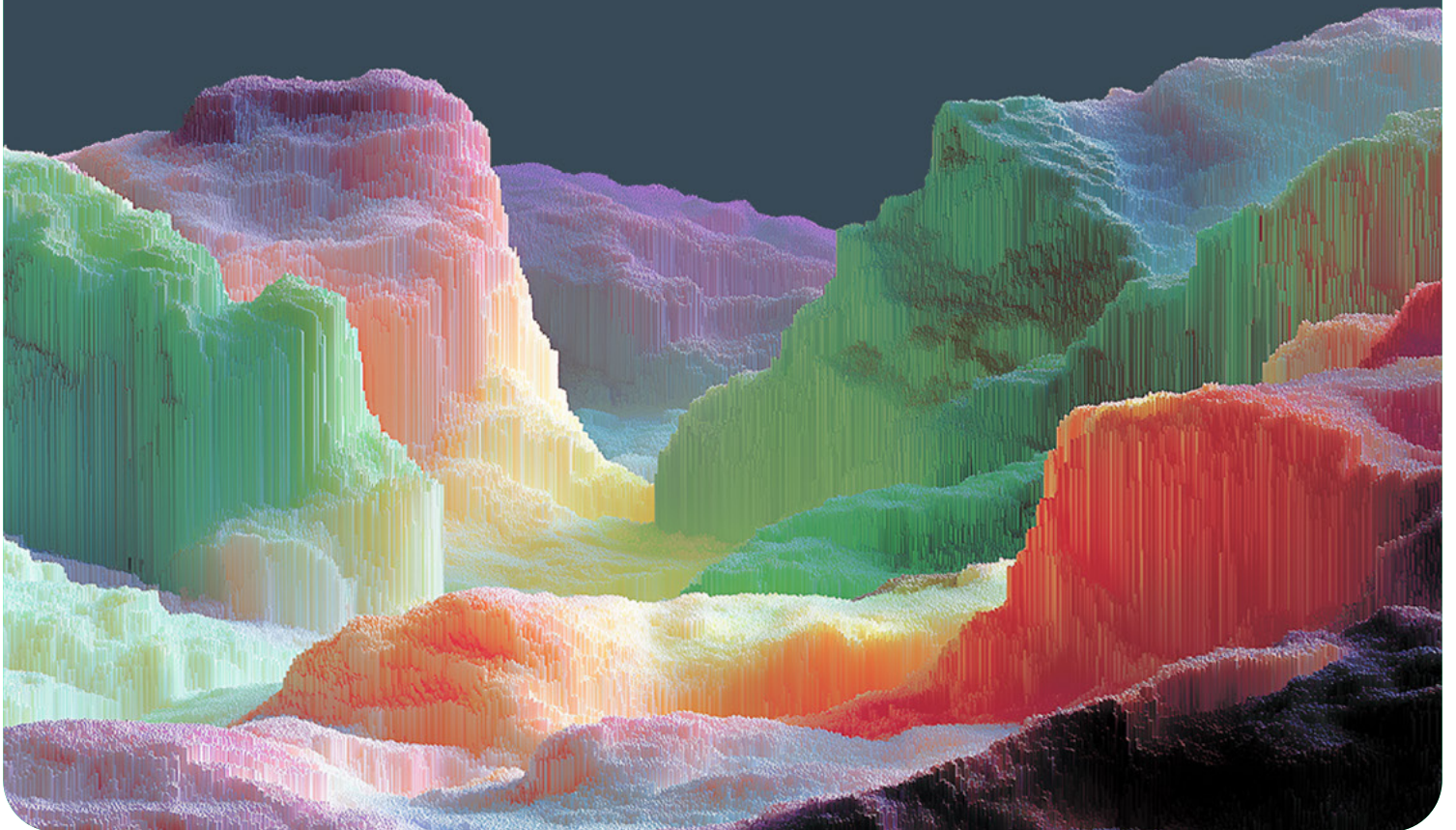
See Nitro in action



02

AI in the Delivery Engine

What AI can actually do for your delivery
team right now



How to build AI momentum that sticks in your PS org



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Josh
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Randeep
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(Moderator)
VP, Professional Services

» rocketlane

In professional services, we have become experts at using AI to pull data, format reports, and automate the mundane.

We celebrate time saved as an end goal, but overlook the most important question a leader can ask: where is the team actually spending the time we're saving? The silence before that answer reveals something most PS orgs aren't ready to admit. We have implemented the tools but have not yet redefined what the people using them are for.

Here is what three PS leaders found when they stopped measuring AI by time saved and started asking what actually changed as a result.

1. The first version almost never works

At Verint, embedding AI inside the product forced a legacy services team to become overnight experts without updated SOWs or resetting customer expectations. At Proofpoint, AI-generated summaries were trusted too heavily, and hallucinations reached customers before anyone caught them. At Glean, automated QBRs failed because the evaluation process hadn't been built yet. What all three found was that failure is the foundation, and every misstep built the intelligence that made the next attempt better.

2. Kinking the curve: from saving time to scaling revenue

Josh Rutberg put it plainly: AI has to kink the curve on headcount linearity. At Verint, automating SOW generation cut turnaround from three weeks to one, and the real win was handling significantly more attach revenue without adding a single hire. At Proofpoint, automating meeting minutes and live translation across 130 people wasn't celebrated for the hours freed, but for what it meant: delivery staff could stop being admin assistants and start being strategic partners, present with the customer and focused on outcomes.

3. The change management chasm

The investment gap in AI adoption isn't tooling; it's change management, and almost every organization underestimates it. Start with leadership identifying the high-value processes that need to change, while practitioners are incentivized to find the how. Adoption spreads from the inside out rather than collapsing under a top-down mandate.

4. A new north star: outcomes, not hours

The panelists expect the next twelve months to move away from P&L and revenue growth toward outcome-based metrics, chiefly time-to-value: how quickly a customer sees a return on their investment. Alongside that, AI-driven project health analysis is replacing manual status reports, surfacing risks in real time so teams can resolve issues before they escalate.

The better question isn't where the time went. It's whether the customer's experience changed because of it. If the answer is "it hasn't," the implementation isn't a giant leap yet.

How to turn your onboarding team into AI orchestrators



**Shehryar
Malik**

VP Implementations &
Customer Onboarding



At a certain scale, a small mistake becomes a crisis.

Tipalti remits \$90 billion annually across 6,500 customers. Their 60 onboarding managers each carry 10–15 concurrent projects through an 80-step implementation process.

At that scale, a missed configuration doesn't just create a bad customer experience. It triggers a financial event. For years, the answer to addressing the risk was more people, more oversight, more process. Shehryar Malik decided to find out what would happen if the answer was something else entirely.

He built eight agents and cut the time to go live by 25%. And this is his blueprint on how to get there.

1. Start with a hackathon to get them to taste the joy of building

Malik didn't start with a roadmap. He gathered his entire IC team, around 60–70 people, and ran a hackathon. Each person mapped their own process, identified where they were losing time, and proposed where AI could help. The ideas that emerged from the session became the agent backlog. Eight of them are now in production.

2. Build agents doing real describable work

The Internal Knowledge Transfer agent scans all pre-sales and implementation call recordings, then produces a briefing document before kickoff with risks, champions, detractors, what the customer bought and why. No more asking questions that the sales team already answered.

The Configuration Engine pulls from the customer database and pre-builds instance setup based on how similar customers are configured, saving two hours per project.

The Proactive Sentiment Analyser listens to customer calls daily and raises a flag the moment a call goes badly before the customer has a chance to escalate.

3. Ask the question that changes everything

Most teams ask, How do I automate what I'm already doing?

Malik's team was asked a different question: if you had no existing process and only AI, how would you design onboarding from scratch? That reframe is what separates incremental efficiency from a genuinely different delivery model.

The results so far are 80% fewer escalations, 10–15 hours saved per project, and 25% faster time to go-live.

Lessons Learned So Far

1. Start from specific pains, not "we need AI"
2. Redesign, don't just digitize your current process
3. Handle data and sandbox decisions early
4. Give each agent a clear role and a success metric
5. Change management is not optional

Run a one-day hackathon with your IC team. Ask them to map their top five time sinks and propose one AI fix for each. You don't need a strategy, you need a starting point.

How to design your PS function before you automate it



**Merlin
Komenda**

Director of Implementation &
Onboarding,



If you were building your Professional Services function from scratch today, would you keep it the same? When faced with the challenge of commercialising a previously free service, Merlin Komenda asked herself this exact question.

The answer was no. Rather than automating what already existed, she designed for clarity first, focusing her team on leading with expertise rather than checklists, and rebuilding every step around what the customer actually needed to receive.

The result was a 30% reduction in time to go-live, first value cut from 30 days to 15, and a 9/10 customer experience sustained throughout. Here is how she did it.

1. The wrong starting point is still the most common one

When Merlin took over, she did what most new leaders do: drove efficiency, clarified ownership, simplified processes. Rules required full setup before customers could use anything, kickoff calls handed over blank spreadsheets, and no one agreed on what “done” meant. The redesign started with one question for every step: what customer outcome is this responsible for? The steps that couldn’t answer it got removed.

2. A decision tree for knowing what AI should touch

A three-question filter for where to automate and where not to.

1. Is it customer-facing?

If not, it’s a candidate for automation. If yes, keep it human for now.

2. Is it high effort or repeated?

If yes, assist with AI but avoid full automation; the stakes are too high.

3. Is it accurately defined?

Can you actually define what success looks like for this step? If yes, it’s ready to automate. If not, design it first.

Merlin’s team ran this across their entire implementation and found that live training failed every test for automation. Their customers needed the relationship, the accountability, the custom validation. Trying to automate it produced near-zero uptake. Protecting it produced better retention and stronger customer confidence.

3. Why did implementation become easier to sell?

When an implementation is designed for the customer rather than for the team’s own execution, something surprising happens internally: it becomes easier to sell.

Zappi was moving from a free service to a paid offer. The redesign made that conversation easier, the sales team could now clearly articulate what implementation actually delivered, and became advocates for a service they’d previously struggled to explain.

Pick three steps from your current implementation plan. For each one, ask: what customer outcome is this step responsible for? If the answer isn’t clear, that’s where the redesign starts.

AI for PS leaders: 10 things you should know



Srikrishnan
Ganesan

Co-Founder & CEO



You don't have to understand how something works to be accountable for what it does.

In his session, Srikrishnan Ganesan gave PS leaders ten things they need to understand about AI. The leaders who thrive in the next two years won't necessarily be the ones who built the best agents. They'll be the ones who knew enough to ask the right questions of their teams, their vendors, and the agents already running in their stack.

This session distilled ten of them. Here are the three that matter most for where PS is heading.

1. MCP is why your agents can actually do things

Model Context Protocol is the open standard that lets AI plug into your stack — your PSA, your CRM, your calendar — without bespoke integrations. The reason one agent can read your Google Calendar and write to your Rocketlane timesheet in the same conversation is MCP.

Most applications offer MCP for standard operations: creating tasks, managing projects, logging time. What Sri argued PS leaders should push for is config MCP, the ability for an agent to reach into your PSA's configuration layer and do setup work that today happens manually, click by click. Configuration is where PS hours disappear. Setting up 29 project templates for a new customer used to be a two- to three-week exercise with an outsourced partner. With the config MCP, it took two hours. Product teams have historically been reluctant to expose config APIs, but MCP changes the calculus. Go back and make the pitch.

2. Your playbooks are becoming software

A skill is your QBR template, your kickoff checklist, your scoping process, wrapped in a format AI actually follows instead of improvising around. Skills make your expertise repeatable. Dispatch makes everything ambient: text your AI from your

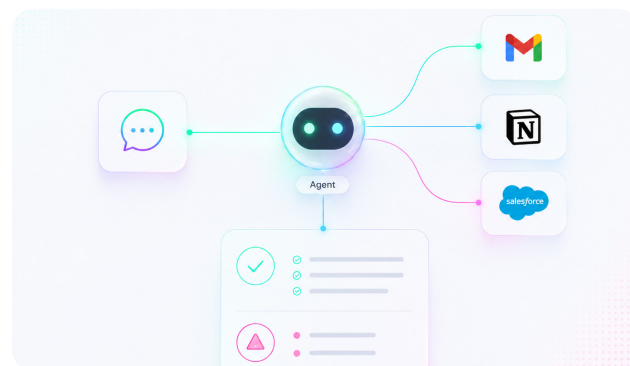
phone while it runs on your laptop.

Sri described sending an introduction while out to dinner. Instead of making a note to do it later, he asked AI to draft the email, reviewed it, and sent it. The gap that matters is no longer from idea to task. It's from task to done.

Together, skills and dispatch move AI beyond answering questions. They turn it into an operating layer that can execute work on your behalf.

3. What's coming and what to do now

Voice agents that interview stakeholders before kickoff. Agents that review their own past runs overnight and update their own memory. Multi-agent orchestration that mirrors how PS teams already work, one coordinator, multiple specialists. The architecture exists. The question is whether your playbooks, your data, and your team are ready to hand things off to it.



Pick one MCP that already exists in your stack. Ask your product or engineering team for a config MCP. Convert three of your most-repeated playbooks into skills. And before the quarter ends, vibe-code something real for your team, not a prototype, a tool they'll actually use.

How to build an AI scoping engine for professional services



Joey
Poarch

CEO

PSQuote

In most service businesses, margin doesn't disappear in one dramatic moment, it bleeds out slowly, in the gap between what was estimated and what it actually cost. Tercera tracks a 50–65% gross margin for AI-led PS firms versus traditional ones, and expects the gap to widen.

Seventy-five percent of PS data is unstructured, locked in emails, spreadsheets, and tribal knowledge. Separately, fifteen to twenty percent of margin bleeds out before a single deliverable is produced, not from bad work but from bad estimates. Joey Poarch has spent 27 years in professional services and built PSQuote on one premise: the industry's margin problem is a data problem, and AI has finally made that data legible.

Here is the 4-step solution to building an AI-led scoping engine:

1. Standardise the foundation first

AI cannot function on top of chaos. Before any tool gets deployed, rate cards, cost rates, resource roles, scope definitions, and estimation frameworks need to be standardised. This is table stakes, without it, the output is not optimal regardless of how good the model is.

2. Treat every quote as training data

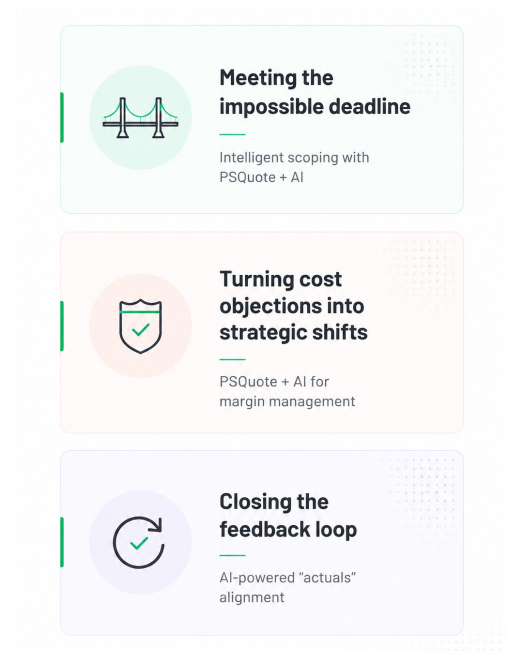
Build a repository and log every quote – which ones converted, which didn't, and how as-sold compared to as-delivered. Over time, your CRM becomes a learning engine, and every deal teaches the next estimate something the last one didn't know.

3. Deploy AI on one use case first

Rather than automating everything at once, pick one high-impact starting point. Note-to-quote – generating a structured resource plan from meeting notes or an RFP is the right place to begin. It builds traction, builds team confidence, and produces results fast enough to earn the next investment.

4. Close the loop

Every quote should be compared to delivery actuals. The system learns from the variance, adjusts, and improves automatically. That is the flywheel: quote, deliver, analyse, learn. Over time it produces 50% more accurate estimates, 50% fewer scope surprises, and a margin advantage that compounds with every deal.



Pull your last five engagements and measure as-sold versus as-delivered. That gap is the baseline your AI scoping engine needs to close.

How to scale delivery 3x without growing your team



Raj
Rajasekar

CEO



Rashmi
Kiran

Co-Founder



When a services business is growing fast, the instinct is to hire.

At Saasgenie, 35 people were carrying 100+ projects, on-time delivery was stuck at 60%, and PMs were working weekends just to send status updates. Raj Rajasekar and Rashmi Kiran recognised that adding more people to a broken system would only scale the chaos and rebuilt from the ground up instead.

Twelve weeks, \$63,000, and a 2.5x increase in delivery volume later, here is the sequence that made it work.

1. Structure before speed

Before touching AI, they spent four weeks building shared infrastructure in Rocketlane: a 6-phase lifecycle, a template library, customer portals, and a HubSpot integration that auto-created projects on deal close. Weeks 5–8 added data and capacity models. AI came only in weeks 9–12. The sequence was deliberate: without structure, AI has nothing reliable to read. Without AI on top, the busywork stays manual. The two things compound – but only in that order.

WHAT NOT TO DO

- ⊗ **Not to do:** Automate everything at once
- ✓ **Do instead:** Start with ONE, perfect it, then add next.

- ⊗ **Not to do:** Skip change management
- ✓ **Do instead:** Explain the why, show quick wins.

- ⊗ **Not to do:** Let PMs customize the process
- ✓ **Do instead:** Standardize first, core process is sacred.

- ⊗ **Not to do:** Build custom integrations immediately
- ✓ **Do instead:** Use Zapier/native integrations first.

- ⊗ **Not to do:** Send AI outputs without review
- ✓ **Do instead:** AI drafts, human refines (80/20 rule).

The lesson:

Start simple. Prove value. Get buy-in. Scale gradually.

2. Four workflows, dramatic time savings

AI targeted the work eating the most low-value hours.

Status reports: 30 minutes down to 2.

Meeting notes: 20 minutes down to 3.

Documentation first drafts:
4 hours down to 45 minutes.

Time tracking: 15 minutes down to 2, handled by an agent that reads the calendar and proposes entries for PM approval.

For complex delivery work – data migrations, configurations, integrations – proprietary AI tools cut cycle times by 50% or more. The rule is for AI to do 80% and for people to own the 20% that requires judgment.

3. \$63K in, \$1M–1.4M out

Total investment over 12 weeks: \$63,000. Annual return: \$1M–1.4M from capacity unlocked, escalations avoided, and margin recovered. Payback in under three months.

Same team, 2.5x the volume. On-time delivery: 60% to 90%. And it compounds with every new project runs on the same templates, making the whole system sharper without adding headcount.

Pick one AI workflow like status reports. Build it first, prove it, get buy-in, then add the next. Start simple. Scale gradually.



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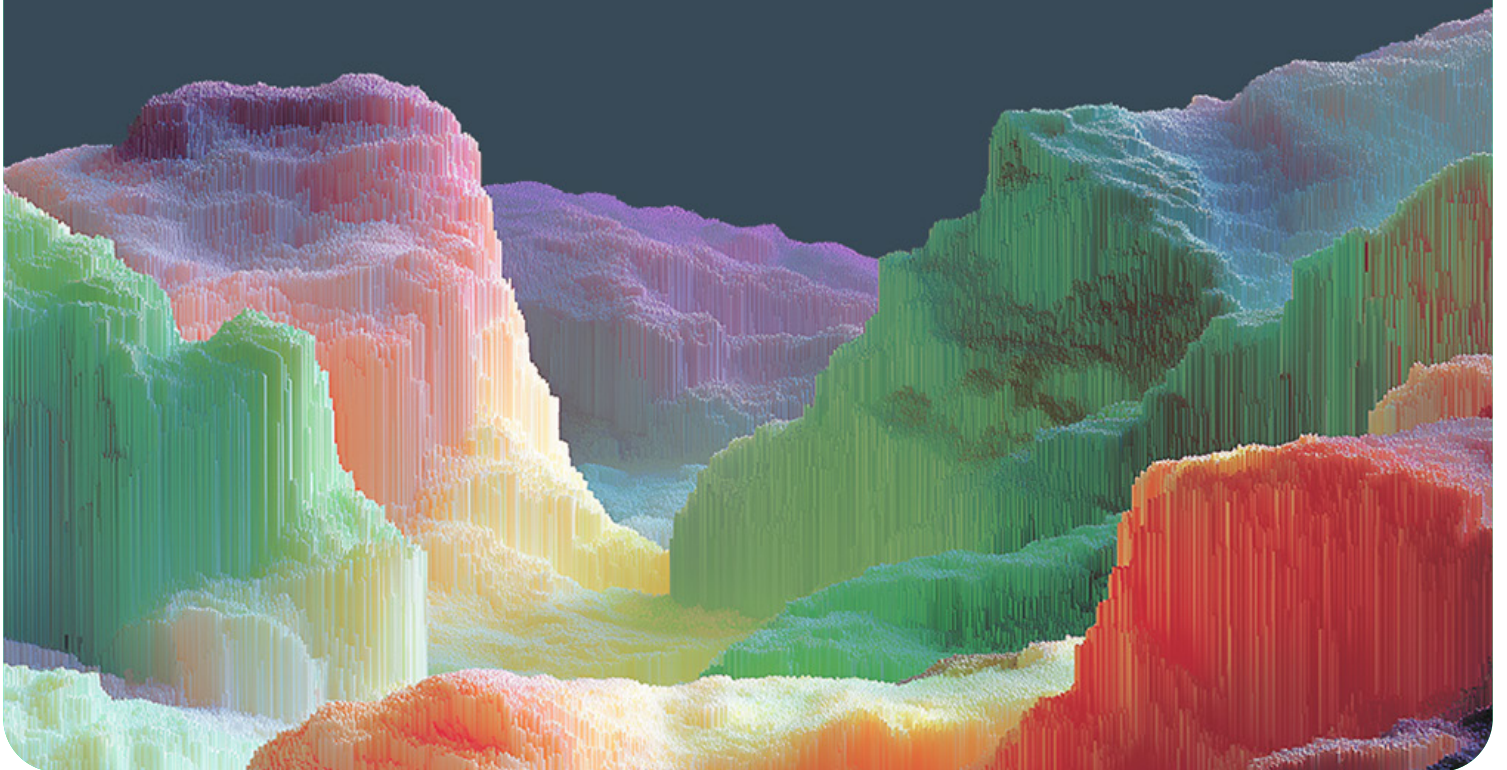
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03

Redesigning Delivery for Outcomes

How to restructure your team's delivery
from the ground up



How to build your implementation function like a product



**Emily
Garza**

Chief Customer Officer



In a regulated world of fraud and money laundering, Unit21 thought speed was the ultimate metric. Two years ago, they pushed to cut their 90-day implementation average to under 60 days.

They succeeded at hitting the date but failed at creating success. By launching customers in an “MVP state,” they exhausted their customers’ limited engineering resources, leaving them stuck with unfinished products and no path to value.

That lesson sparked a total rebuild of their delivery model. Emily Garza (CCO, Unit21) shares three levers they used to turn the tide by treating implementation as a product they build and not a service itself.

1. Stop assigning homework

Every task you put on a customer is a task that can stall. Unit21 audited their entire plan and asked three questions for every customer-assigned item: could we do it ourselves? Could we do it faster? Or are they owning this just because we’ve never rethought it?

Most of the third category turned out to be optional. The result was an FDE function that finds and solves technical blockers in real time, when banks couldn’t handle API ingestion, FDEs worked with a product to build flat file ingestion instead of waiting on the customer’s engineering team.

2. Define the outcome before the work starts

Go-live is a milestone, not an outcome. Unit21 comes into every kickoff with a recommended path rather than a blank slate and a list of homework. Outcomes are tracked in the customer’s language: not “rules configured” but “fraud detected faster” and “analyst hours saved.” Ninety days post-live, the team hands over a proof document — use cases activated, outcomes in motion — that gives the customer something to show at their next executive review.

3. Use AI for the work everyone hates

Start with the sales handoff. Everyone hates it. Sales doesn’t want to fill it out; implementation always wants more. AI now pulls from call recordings and emails and delivers a structured brief: what was sold, what was promised, what success looks like. Rule-building dropped from an hour per rule to 15 minutes. The principle: find what people hate, find what doesn’t require judgment, start there.

Align on Outcomes Before Work Starts

Three questions before your next kickoff

- ✓ What does the customer’s leadership define as success?
- 🔍 What’s the measurable baseline today?
- 📅 How will you prove the delta at 90 days?

Pull up your current implementation plan. For every task assigned to the customer, ask: are they doing this because they have to, or because we haven’t rethought it yet?

How to move from documentation-first to prototype-first delivery



Vandana
Dandge

Chief Delivery Officer



Most delivery orgs build exactly what they're asked for and still miss the outcome.

In Lead-to-Revenue implementation, the misalignment that kills a project rarely shows up early. Requirements shift, stakeholders multiply, and by the time something feels wrong, it's usually UAT, ten to twelve weeks in and too expensive to fix.

Vandana Dandge's answer to fix that was simple: show clients something real before the requirements have a chance to drift.

Here is how she redesigned the model to make that possible.

1. Go from "Tell & Wait" to "Show, Tell & Iterate"

The old model has a predictable failure point: weeks of requirements gathering before a client sees anything real, then surprises at UAT. The new model collapses this. Discovery agents ingest the SOW and prior documentation to produce structured user stories prioritized by revenue risk.

Design agents translate those into system diagrams. The result is a working prototype a client can react to in weeks, not a requirements document they'll read once and file.

2. Restructure around what AI actually changes

AI doesn't eliminate roles, it restructures which ones matter. When agents handle documentation, boilerplate code, and routine testing, the human skill premium shifts toward judgment, client relationships, and revenue logic. Senior architects move from writing specs to governing outputs. The question isn't how many people to cut, it's which capabilities to protect as AI absorbs the connective tissue between them.

3. Close the loop between delivery and pre-sales

Most scoping decisions are made without access to what actually happened on past engagements. A deal scoped without knowing a client's data quality, stakeholder accessibility, or revenue ops maturity will miss on timeline and margin. The architecture Forsys built feeds delivery actuals back into pre-sales and what happens on each engagement sharpens the next estimate.

Your Blueprint – Start Monday

Five Steps. One Direction.

 Step 1 – Diagnose

 Step 2 – Pilot

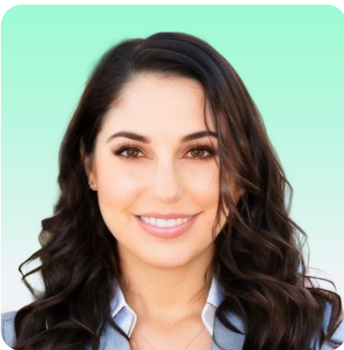
 Step 3 – Govern

 Step 4 – Shift

 Step 5 – Close Loop

Find your longest delivery phase. Pilot one agent, one project for two to three weeks, that's where to start.

Three ways to turn your delivery team from order-takers into consultants



Stacey Milgram
Potzka

VP of Operations & Implementations

actabl



Amanda
Stewart

Senior Director of Implementations

actabl

Actabl's implementation team was technically excellent and invisible on customer calls, nodding along, saying yes to every request, letting customers set the agenda. We have all been there before.

Stacey Milgram Potzka recognized it as a process problem, not a people problem. She built a consultative framework, trained AI on Actabl's voice, and watched timelines drop from 450 days to 7 Days.

Here is how each of those three changes worked in practice.

1. Build the consultative framework, then hold the team to it

Most implementation teams are trained on the product, not on how to run a conversation. Actabl adapted a five-step consultative process from sales methodology — ask questions first, present solutions in the customer's language, close with named owners and next steps, and certified the team quarterly. Every live call is scored, and anything below 85% gets coached back up. The team now sits consistently above that mark in an industry where 70% is considered strong and escalations that were once routine have disappeared.

2. Use AI to catch what your team misses

Skilled consultants hear what customers say but what they often miss are the signals beneath, like the tone shift when a deadline comes up, the concern mentioned once and never raised again. Actabl uses AI fills inside Rocketlane to surface these hinted needs from transcripts and deliver them as preparation before the next call, not as a report for management.

3. Train AI on your team's voice

AI-generated summaries only work if they sound like your team wrote them.

Actabl trained its AI on the language their teams use with customers, which is collaborative, not directive. "We're going to work through this together" instead of "you need to complete this." A Director Outreach Program uses these summaries to proactively check in during onboarding, keeping CS, support, and sales aligned around the same customer picture.

Write down three phrases your team uses that land well with customers, that's the seed of your partnership language. Feed it to your AI.

Checkpoints for measuring implementation value before go-live



Chris
Pinaire

Director of Consulting/
Implementation



For twenty-two years, Chris Pinaire measured success the way most delivery leaders do: on time, on budget, every milestone hit.

Then a single project with an aerospace manufacturer showed him how wrong that definition could be.

It ran six months, cleared every metric his team tracked, and by every measure was a success. Three months after go-live, the program managers refused to use the system. The outcome that actually mattered, each PM saving three hours a day, didn't arrive until month nine.

So here are the three things GlobalShop rebuilt as a result, and one of them starts before the first kickoff call.

1. The Milestone Value Map: Add five checkpoints before the finish line

Rather than waiting until after go-live to measure success, GlobalShop tracks value at five checkpoints during delivery: data accuracy at week two, real production transactions at month two, operational self-service at months three to four, full user self-sufficiency at months five to six, and customer-reported wins at months seven to nine. Go-live sits in the middle of that map, so if something is drifting, you find out while there's still time to fix it.

2. Add one customer outcome metric this quarter

Choose a metric the customer would put on their own dashboard, not one that only your team tracks. For GlobalShop, that's job cost variance for mid-market manufacturing customers. Define three leading indicators that tell you whether you're on track before go-live, then run 30, 60, and 90-day reviews after go-live that check whether KPIs are actually moving, not whether training was completed.

3. Pilot one AI use case – and test one new service

GlobalShop built an agent chain in Cursor, AI coding tool generating quote, technical spec, code, tests,

and documentation in sequence and cleared months of custom development backlog in weeks. A separate experiment, the Virtual Controller (financial consultants closing month-ends for customers), started with two accounts and now serves 65 or more every month. The best way is to always see what holds after starting with a PoC .

Four layers

AI as the enabler, outcomes as the goal



Implementation Intelligence

Predict risk and recommend best-practice configurations before kickoff.

Fewer surprises. Faster starts.



AI-Assisted Consultants

Real-time config suggestions, knowledge copilots, context-aware playbooks.

Humans solve business problems, not configure software.



Adoption Intelligence

Predict risk and recommend best-practice configurations before kickoff.

We measure value realization, not task completion.



Continuous Outcome Monitoring

Predict risk and recommend best-practice configurations before kickoff.

PS becomes a continuous value engine.

Add one customer outcome metric to your next engagement. Pick it by Friday.

How to give clients confidence through a process you can't simplify



**April
Slinger**

Director of Client Implementation
& PMO

healthEZ

Giving someone confidence in a process they can't fully understand is one of the hardest things to design.

HealthEZ manages self-insured health plans with nearly one million possible configurations per setup. During the busy season, the team handles 45 new groups and 150 renewals, on go-live dates the customer sets, sometimes with as little as one business hour to spare.

The buyers are HR leaders making high-stakes decisions without technical backgrounds. April Slinger's challenge was to give them confidence in a process that cannot be made simple, only easier to navigate.

Here are three design principles she built the experience on.

1. Abstraction, not elimination

In 1869, the Transcontinental Railroad exposed an invisible problem: 144 local times across North America. The fix wasn't teaching passengers to calculate solar angles. It was the time zone, a framework that absorbed the complexity so nobody else had to. April applied the same logic to HealthEZ's 80-step implementation process, rather than walking HR leaders through every internal task, she redesigned what they saw entirely. The complexity still existed, but the customer never had to carry it.

2. Show outcomes, not tasks

The inspiration was the Domino's Pizza Tracker. This tool solves the human problem of anxiety during waiting by showing progress without requiring any understanding of what's happening in the kitchen. HealthEZ built the same thing for health plan implementation. Hundreds of internal

tasks collapsed into three outcomes: access to care, a plan that works, and everyone getting paid. Clients see a simple to-do, doing, done status for each outcome; everything behind it runs automatically. Access to care improved from 43% to 90% over two years, and executive escalations during the busiest season dropped to zero.

3. Give the experience a name

A portal without a name is an admin tool. HealthEZ named theirs "Easy Implementation," put it in marketing materials, and referenced it in every kickoff. Brokers started expecting it on return visits, sales used it as a differentiator, and large brokers now call it the best implementation process in the industry.

Look at your current client-facing view. If the client sees a task list, collapse it into the outcomes the engagement is there to produce.

How to connect your customer promise to proof of delivery



Robert
Haukenberry

PS Leader



Jeremy
Taylor

PS Leader



The deal closes with an outcome commitment, but most organizations have no mechanism to carry that commitment through delivery.

Sales hands it to implementation, implementation to CS, CS to support, and somewhere in that chain, the original promise disappears. Robert Haukenberry and Jeremy Taylor call this the gap between the delivery era and the outcome era: you can hit every departmental metric and still lose the renewal because nobody owned the full arc of what was sold.

Here are the three things that close the gap, and the first one happens before delivery even begins.

1. Substantiate the goal before delivery starts

There's a difference between a stated goal and a substantiated one. "Improve efficiency" sounds like an outcome, but it isn't, not until both sides have answered what the baseline is, what specifically will change, how it will be measured, who owns it, and what could prevent it.

Until those questions are answered, the delivery team is navigating toward something neither side could recognize if they found it.

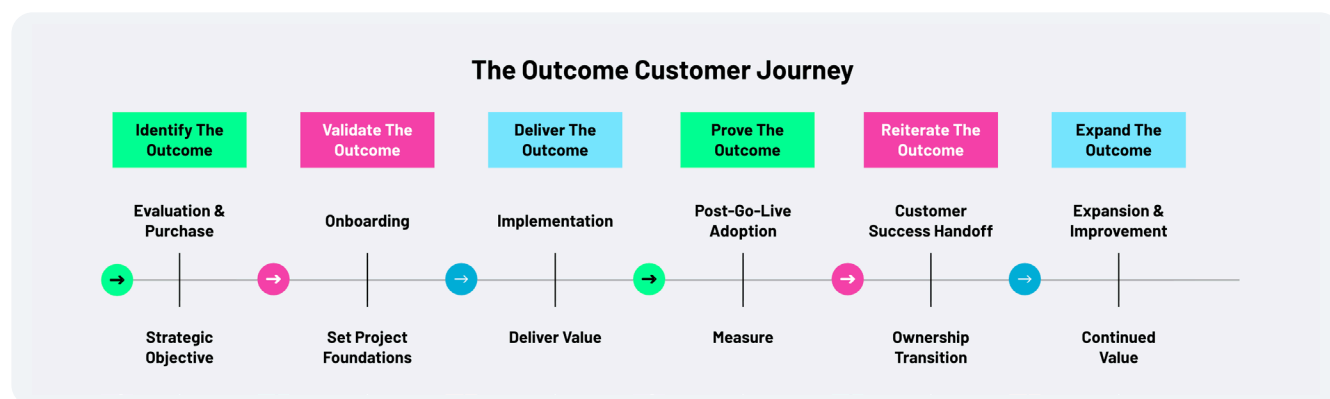
2. Let the value assessment travel the full journey

Most organizations build a value assessment during the sales cycle and abandon it at signature. Before closing, it validates the outcome and the baseline.

After signing, it should become the delivery team's north star, the CS adoption plan, and the proof base for renewal. Apricity builds this as a single living document that moves with the account, so the conversation at renewal is grounded in the same language the customer used when they bought. The document that justified the purchase should be the document that proves it was worth it.

3. Make PS and CS the stewards of the outcome arc

No other function holds the full arc of a customer engagement. PS and CS see what was sold, what was built, what the customer adopts, and where the gaps are. That position makes them the natural early warning system, the team that should flag when promise and delivery have diverged, before the customer surfaces it in the renewal conversation.



On your next engagement kickoff, write the customer goal in a form both sides would sign. Share it with every team that will touch the account.

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 zendesk	 Palantir	#loQast
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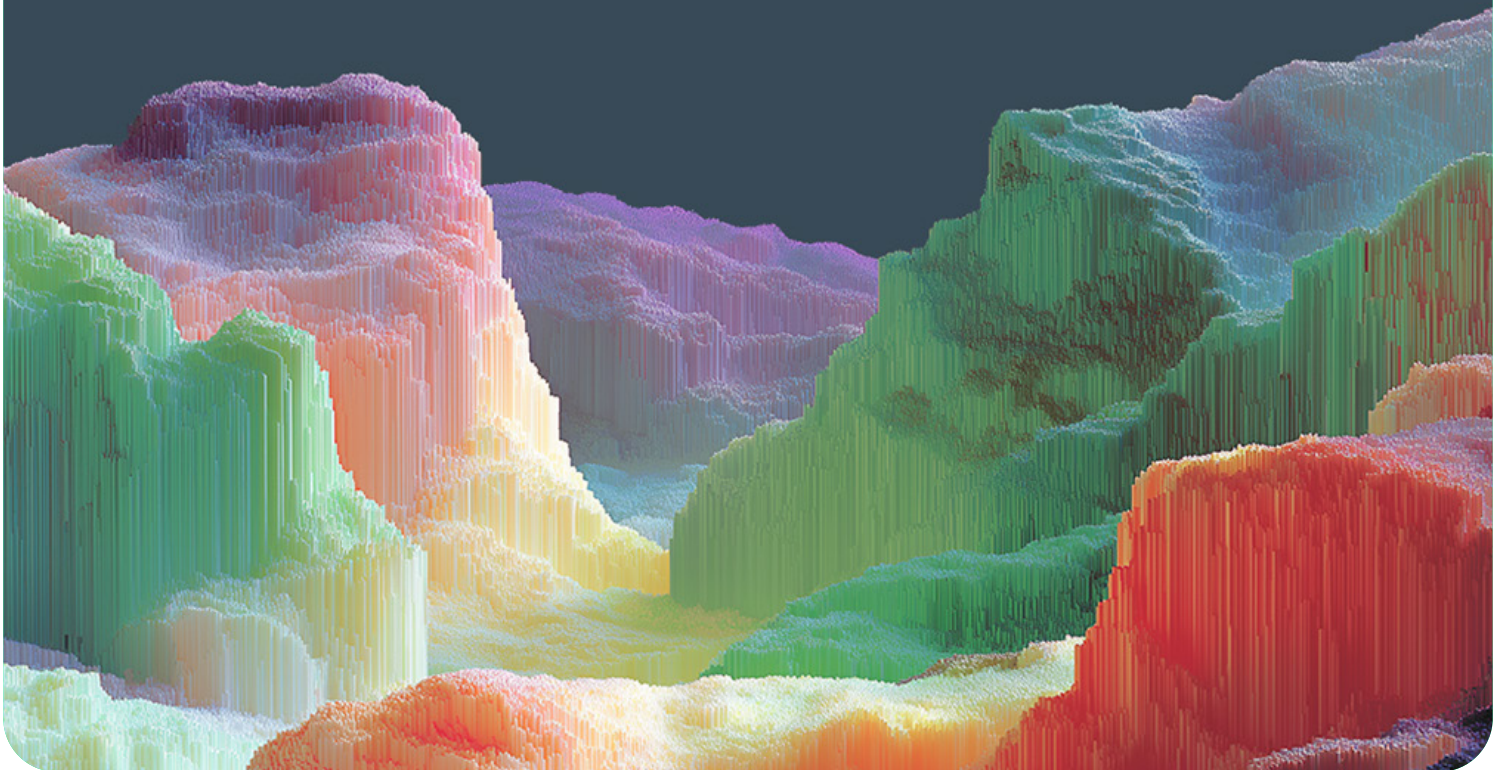
Join the community



04

The New Roles Shaping PS

What skills, responsibilities, and roles does
your team actually need in the Outcome Era?



Can you prove your implementation team matters?



Kevin
Stanley

Director of Implementation

MaintainX

Most implementation leaders can tell you exactly how their team performed last quarter. Kevin Stanley spent years at MaintainX being able to do the same, and eventually realized it wasn't enough.

At a platform serving 15,000 companies running physical operations, his team was high-functioning by every delivery metric. But none of those metrics could answer the question that mattered most to the business: did this customer actually change how they operate? That was a gap, and it was costing the team its seat at the table.

Here are three things he rebuilt to close the gap.

1. Shift from implementers to transformation advisors

Automation and AI are consuming the configuration layer of implementation, and customers increasingly don't need a human to turn the system on. The shift to transformation advisors is the only defensible position in an AI-era PS org. MaintainX couldn't keep hiring to match growth, so they had to fundamentally rethink how implementation creates value, not just for delivery metrics, but for the business and the customer.

2. Track the chain from mission to strategy to proof

Billable hours, utilization, and time-to-implementation don't answer the question that matters: did this customer change how they operate? A 17-day go-live looks excellent until the adoption score shows no one is using the platform. Your metrics should trace a chain — mission to strategy to proof. Track time-to-value and adoption score side by side. If you can't follow the chain, you're optimizing for the wrong finish line.

3. Run delivery in three phases

Establish operational truth, drive behavioral change, and prove the impact. Always in that order. Phase one is about enrolling the team, making sure everyone understands the mission and what success looks like. Phase two is where measurement begins. Phase three is where PS earns its seat at the table: trusted advisor to clients and leadership, proving impact, driving growth.

Leading Through the Shift: Lessons from MaintainX



Lead with Vision, Hire for Values

Set a clear vision, then bring the right people with the right values and culture.



Bridge Product & Customer Outcomes

Your impl team sees what happens when product meets reality. Feed that insight back.



Be the Strategic Partner

Have a seat at the table with sales, product, and CS. Shape what success means.



Invest in Your People

Frameworks and metrics matter, but your people are the secret sauce.

Pull your current PS KPIs. For each one, ask: Does this prove transformation or just delivery? Cut what can't answer that question.

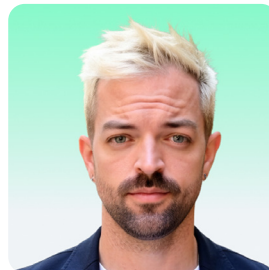
4 flavors of FDE: how to build the one your org needs

Moderated by Srikrishnan Ganesan
CEO, Rocketlane



**Miku
Jha**

VP of Applied AI & FDE
servicenow



**Landon
McCaig**

Head of Global
Implementation Services
 **INTERCOM**



**Alex
Laverty**

Customer Success
Harvey



**Rajkumar
Irudayaraj**

SVP, Global Technology &
Innovation Partners
alteryx

Some of the most important jobs right now don't have a rulebook yet. MIT research puts 88% of funded AI proofs-of-concept at never making it to production, and that number is the entire reason the FDE function exists.

Someone has to close the gap between what AI can do and what organizations can actually adopt. Four companies on this panel run FDE programs with the same title and four completely different operating models, and which one you build changes everything downstream.

Here is how each of the four models works, and how to choose the one that fits your org.

1. Know which of the four models you're building

Four distinct archetypes share the FDE label.

- ◆ **Product-embedded (ServiceNow):** Every customer build becomes a reusable platform asset that feeds the roadmap.
- ◆ **Delivery contributor (Fin):** Engineers ship one to two product updates per week, turning implementers into product developers.
- ◆ **Domain expert (Harvey):** Hire practitioners from the customer's own field — lawyers take advice from lawyers, not software consultants.
- ◆ **Commercial event creator (Alteryx):** Create the commercial moment, and move on.

The model you're building determines who you hire, what you measure, and how you protect the resource.

2. Time-box the engagement and build in a kill trigger

An FDE is time-boxed by design, unlike a resident architect who may embed for a year or longer. The Alteryx team built in a kill trigger: if the criteria aren't met, no real data access, and no business owner with a KPI on the line means the engagement stops. Perpetual FDE work without data access isn't FDE work; it's an expensive service project. The FDE creates the moment. The system takes it from there.

3. Prove the model on yourself; be your own first customer

You don't need a large team to start. The minimum viable pod at Alteryx was one solutions architect, two engineers, and ten to twelve weeks. The fastest way to define your own flavor is to be your own first customer and prove the motion internally before you take it to accounts.

Before you define your FDE role, answer one question: Do you want FDEs to feed your product, or to accelerate commercial events? The answer changes who you hire and what you build.

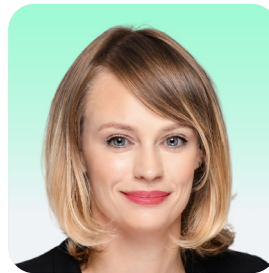
Five shifts defining the PS org of 2027



CJ
Tully

Director of Professional
Services

 **smartsheet**



Leanne
Snoeck

Director of
Implementation Services

 **quickbase**



Jeff
Rosenbaugh

Sr. Director of
Professional Services

 **Lucid**



Omid
Razavi

(Moderator)
Founder

 **SuccessLab**

45% of executives report meaningful AI ROI from their organizations. But only 27% of their managers agree.

That gap doesn't live in the technology. It lives in the layer that's supposed to translate AI investment into actual delivery change, and it's the PS org that sits in that layer.

Three leaders at Smartsheet, Quickbase, and Lucid spent an hour on exactly that problem, and here are the five shifts that determine whether your PS org closes that gap or widens it.

1. Shift from capacity-led to leverage-led delivery

AI doesn't replace the consultant — it removes the non-value-add work that crowds out customer time. Updating a RAID log, drafting status collateral, and generating UAT scripts: every hour automated is an hour redirected to judgment-based work that actually moves outcomes. The goal isn't a smaller team. It's a team doing fewer of the wrong things.

2. Move from project managers to delivery orchestrators

The role is changing from tracking work to coordinating people, AI agents, data, workflows, and outcomes simultaneously. That demands candidates who can manage ambiguity, evaluate AI-generated outputs critically, and hold context across a wide range of customer environments — not just execute a delivery plan.

3. Turn static artifacts into living knowledge systems

High-growth orgs have years of process knowledge scattered across tools and people's heads. Before investing in agents, consolidate them. Lucid's data shows organizations with structured, documented

knowledge reach AI adoption two to three times faster than those without. The orgs winning in 2027 are doing the boring documentation work right now.

4. Win your managers before you roll out AI to ICs

Smartsheet shipped a dozen AI tools over two years and saw flat adoption — until they stopped treating it as a rollout and started treating it as change management. Peer-to-peer proof from ICs sharing specific wins moved the curve faster than any top-down directive. The rollout doesn't stall at the front line. It stalls in the middle.

5. Redefine done: from go-live to realized outcome

If you apply AI while still structured around hours and utilization, you'll get faster at exactly the wrong things. Define what customer success looks like first — adoption, value realization, expansion readiness — then find where AI accelerates the path. Applied to outcome-oriented delivery, it's a force multiplier. Applied to an hours-based model, you've just automated the thing you should have changed.

Score your org against the five shifts. Pick where you're furthest behind. That's where to spend the next quarter.

How to close the gap between the builder and the buyer



Kevin
Bai

Founding Forward Deployed
Engineer

 **RIPPLING**

Palantir invented the FDE function in the early 2000s. Kevin Bai spent four years there, then joined Rippling as their first FDE hire with a single mandate: build the function from scratch at a company that was already thriving without it.

That experience, going from the org that created the role to the org that had to justify it, gives him the clearest definition of what an FDE actually is and isn't.

Here is how he defines it, and what it changes about how you hire, route work, and grow revenue.

1. Hire someone who can consult, architect, and build at the same time

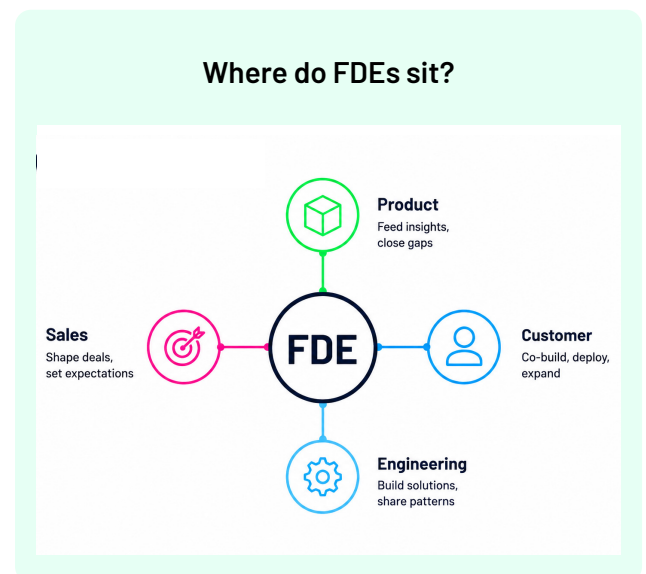
An FDE is a consultant, a product manager, and a software engineer — all at once, in front of the customer. Consultant first: listen until the customer tells you what they actually need. PM next: find the Goldilocks zone — the highest-value problem the platform can solve fastest. Engineer last: build it. Not a demo, but the production system the customer will actually use. Most people can do one or two of these. An FDE does all three simultaneously.

2. Route work correctly: FDE, PS, or product

The space where FDEs are necessary is a technically complex product sold to a non-technical buyer — someone who can't unlock the platform on their own. That's the Palantir problem: a petabyte-scale data platform sold to Coca-Cola. Equally important is knowing when to route work elsewhere. Feature requests go to the product. Pure implementation goes to PS. An FDE deployed on standard delivery work is an expensive resource in the wrong role.

3. Own the gap from pre-sales through post-deployment

The highest-ROI work in an enterprise lives in the gaps: too ambiguous for product, too one-off for engineering. FDEs own that gap end-to-end from pre-sales through post-deployment. Before the deal, they scope what's possible. During delivery, they co-build. After go-live, they stay close enough that when the next problem surfaces, the customer calls them first. That's how bespoke builds become repeatable revenue.



Map your customer requests into three columns: well-defined (→ product), pure implementation (→ PS), and high-value and unclear (→ FDE). The size of the third column tells you whether you need this function.

How to build your team's AI readiness before the cockpit changes



**Brian
Hodges**

CEO & Co-Founder



In December 2019, a Cessna Citation crashed into Lake Erie two minutes after takeoff from Cleveland.

The pilot had been awake 17 hours, had only 8 hours in that aircraft, and was flying an autopilot he didn't fully understand. Brian Hodges knew that pilot.

What the NTSB investigation revealed about how that crisis formed became the foundation of his PS operating framework.

1. Build systems that catch drift before the holes align

Aviation investigators focus on three vectors: environment, aircraft, and pilot. Any single failure is survivable. The crisis comes when all three holes align.

In PS terms: a mispriced engagement is manageable; losing the executive sponsor makes it harder; losing the sponsor mid-delivery, on a mispriced deal, with a consultant across three Projects? That's when the aircraft goes in the lake. The signals arrive first. Build systems that catch them before they line up.

2. Your consultants need personal minimums for AI

Pilots set personal minimums, standards more conservative than what they can legally fly, to buffer between capability and what they should trust.

Your consultants need the same for AI. A consultancy in Australia used an LLM on a government project; it hallucinated, and they were sued. Your team is running AI tools right now. The question is whether they know when to review, when to override, and when judgment must take the wheel.

3. What you owe your team before the question becomes urgent

The ones who thrive in cockpit transitions are those who built the habit of assess, act, reassess before they needed it. Your team is on the same shift.

What they need from you isn't a training program. It's clarity about what their role looks like in the hybrid human-agent system, before AI makes that conversation uncomfortable.

Flight Deck for Professional Services

A four-level operating model framework — built around the same three lenses, applied systematically across every dimension of your practice.

L1	Manual Flight — Get trustworthy instruments
L2	Assisted Flight — Automation with awareness
L3	Hybrid Crew — Humans & agents executing together
L4	Integrated Flight Deck — System-level orchestration

Pick one recent project where escalation happened late. Trace the earliest signal that something was drifting. That's where your AI should be pointed first.

Three ways to move your clients from informed to invested



**Jacqui
Morgan**

Head of Client Delivery Transformation
& Global PMO

Xceptor

Running a program for Goldman Sachs, JP Morgan, or State Street means governance isn't optional. Jacqui Morgan had built every safeguard: twice-weekly meetings, Friday status reports, raid logs, escalation paths. By every measure, she was running a tight program.

Then one evening at 9:47, someone on State Street's steering committee mentioned they'd be two weeks late on a critical dependency. It was the first time Jacqui had heard of it. The problem wasn't that her process had failed. It was that her clients were informed but not invested, and for most teams, the difference only becomes visible when something goes wrong.

Three changes shifted State Street from being a passenger to a partner.

1. Broadcasting versus partnering

Xceptor was communicating regularly with updates, but it was not running a joint project. Status reports went out every week, but did clients actually read them? Did they understand that without their data arriving on time, nothing could move?

When information flows one way, clients follow the project. They don't own it. State Street wasn't a bad client; Xceptor had turned them into a passenger.

2. Open the portal before the pack

The fix was simpler than expected: open the Rocketlane portal at the start of every call and update it together. No prepared status pack. Every action is logged before anyone hangs up — name, date, owner. Clients stopped waiting to be told what was happening and started chasing their own actions, because they could see them in real time.

3. The resistance is internal

The biggest pushback didn't come from customers. It came from the project team.

The senior PM on the most demanding account worried about looking unprepared in front of clients. The clients saw it differently. Their CSAT scores went up, and the qualitative comments were all about the transparency, the feeling of genuine partnership. At renewal, the client said they were signing on not just for the software but for how it was delivered.

**CSAT didn't move a few points.
It re-rated the relationship.**

BEFORE **78%**
average CSAT

+16 points



AFTER **94%**
average CSAT

But the bigger shift was qualitative — the comments stopped saying "responsive" and started saying "on it with us."

Before your next client call, pick one thing you'll update together in real time instead of preparing in advance.

Three ways to scale your team's impact without scaling your team



Hannah
Kinder

Director of Operations & HR



What does it take to increase impact 167x without adding people or budget?

For Greener by Default, the aim was to shift 10 million meals to plant-based food this year, up from 60,000 the year before. The team didn't grow. Neither did the budget. The difference lies in a principle championed by Hannah Kinder: you don't scale a mission through individual willpower. You scale it by designing systems where the right choice becomes the default.

Here are the three systems she built, and what each one was designed to protect.

1. Automate the bottleneck before the relationship starts

The menu audit, a pre-sales diagnostic of a client's food service and sustainability opportunities, consumed 40 hours per engagement. Hannah built an AI tool that trained on the organization's behavioral science methodology: it scans menus, generates the audit, and suggests strategies in 20 minutes.

The consultant reviews, adjusts, and moves to what the role actually requires. One tool cleared 87.5% of the time the team was spending before a contract was signed.

2. Turn your client portal into the consultant in their pocket

Once a client signs, the Rocketlane portal arrives pre-loaded with a kickoff questionnaire — everything the team needs to show up ready on day one. The portal also holds the full methodology: why the nudges work, what data to collect. Clients answer questions without an email. The consultant shows up with a plan already running, and the knowledge stays in the engagement after the team leaves the room.

3. Protect the people doing the mission work

When a team is running on empty from administrative tasks, they can't show up strategically when a client needs it. Hannah calls this operational conservation: remove friction from tasks that don't require human judgment so people have bandwidth for the moments that do. The goal isn't protecting the capacity to show up as a genuine partner when something important lands.

“

Nature doesn't bloom all year round. It requires seasons of rest and efficient energy expenditure. If our team is constantly fighting administrative tax, we are living in a state of permanent drought and we will burn out.”

Hannah Kinder

Director of Operations + HR,
Greener by Default

Find the task in your delivery cycle that consumes the most time before any client relationship has started. That's what to automate first.

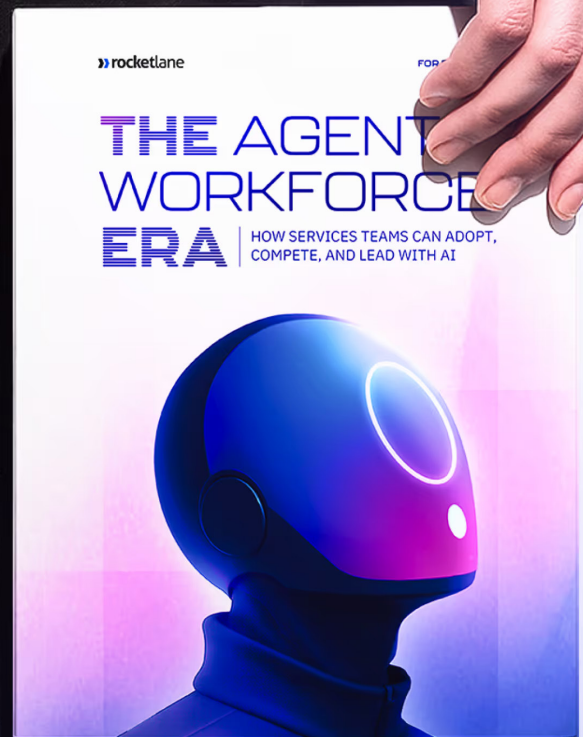
The Agentic Workforce Era: AI for Ps Teams

AI is no longer optional.

Discover how to transform your service delivery workflows with AI, intelligent agents, and predictive models for radical efficiency.



Read Now



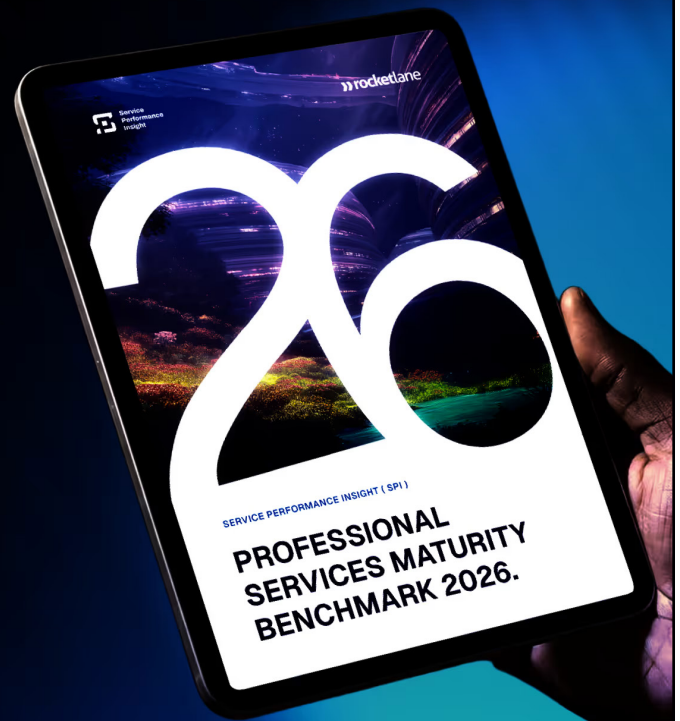
What sets the best PS teams apart?

The 2026 Professional Services Maturity Benchmark Report reveals how wide the gap is between high-performing PS organizations and the rest.

Based on responses from 509 organizations representing 245,000+ consultants and \$63B in revenue, the report breaks down what leading teams are doing differently across AI adoption, billable utilization, delivery standardization, and more.



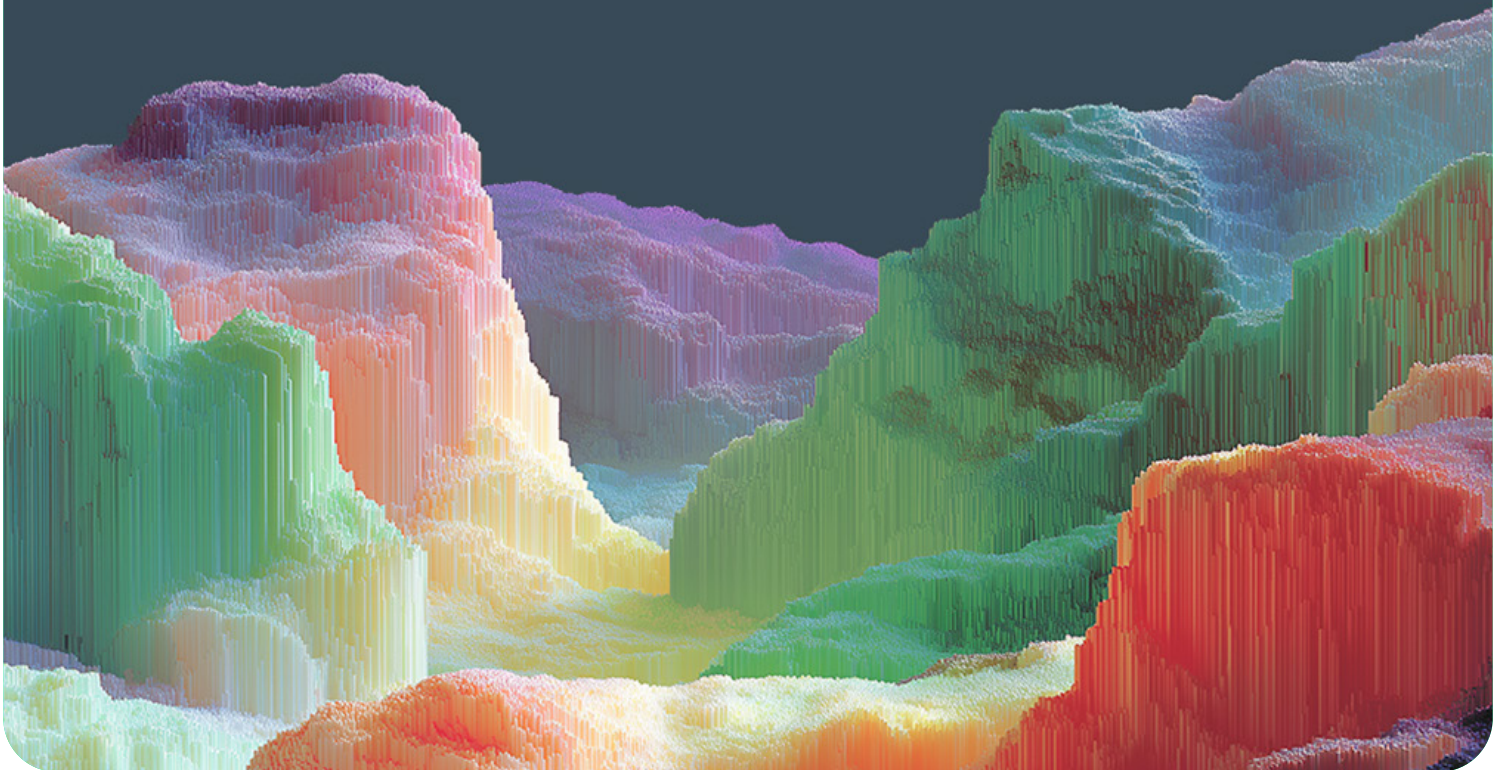
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05

Value Measurement & Proof

How do you make value visible enough
that no one has to guess?



How to hand off momentum, not just a project



**Daniel
Levine**

Director of Implementation &
Professional Services

© WITHCLUTCH

Hitting every target and still losing is one of the most disorienting experiences in any job. Clutch's implementation team was hitting every number: on-time delivery, margin targets, customer satisfaction.

Then CS started missing renewals. When the PS team looked inward and asked what they were doing to set customers up for renewal, the honest answer was: not enough.

So here are three things they changed as a result.

1. Connect what your team delivers to whether the customer stays

Time to value, utilization, revenue, margin — your team should always hit these. But they're leading indicators, not the lagging outcomes your CEO and board care about. Those are renewals, expansions, and customers who stay. If customers spend their first four to six months in implementation, what your team does in that window determines whether CS can close the renewal twelve months later.

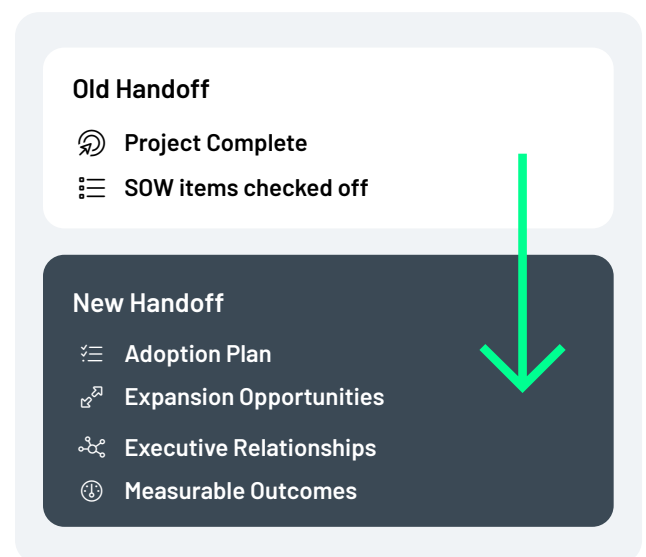
That's the connection most PS orgs haven't made explicit yet.

2. Don't hand off until the health score is green

Clutch made a deliberate decision: no customer gets handed off to CS unless they have a green health score. Yellow or red, regardless of how long the project has been open or how over-budget it's run, means the implementation team stays on. It can be a hard conversation, but when you frame it around what the business is actually trying to accomplish, it's not a hard decision for any executive to make.

3. Bring the CSM in at the right moment — not too early, not too late

Bringing the CSM in at contract signature meant they were sitting idle through most of the implementation. Waiting until after go-live meant a cold handoff with no shared context. Clutch found the right moment: bring the CSM in towards the end of testing, so they see the solution in action, they're present for the customer's first moment of value, and the handoff is a continuity, not a cliff.



Look at the customers you've implemented in the last 12 months. Check their renewal status. What pattern do you find? That's where to start.

Set the goals before the CSM arrives



Kristen
Hayer

Founder & CEO



By the time a customer reaches onboarding, they've sat through fifteen demos, built an internal business case, and absorbed a year's worth of product information in a few weeks.

They finally arrive at kickoff, exhausted and uncertain what happens next, and you arrive with whatever the sales rep remembered to pass along. The result is a kickoff where neither side is ready to set meaningful goals, and the chance to anchor the engagement to real outcomes slips away in the first few weeks.

Here is how she makes sure that the window doesn't close before it's been used.

1. Don't wait for the CSM to set goals

Goal-setting usually gets saved for the success plan, which means it happens months later, after the decision maker has moved on and the context from the sales process has gone cold. Build shared goals during onboarding, not after it. Customers need to see the value they signed up for as early as possible, in their own language.

2. Translate business objectives, don't replace them

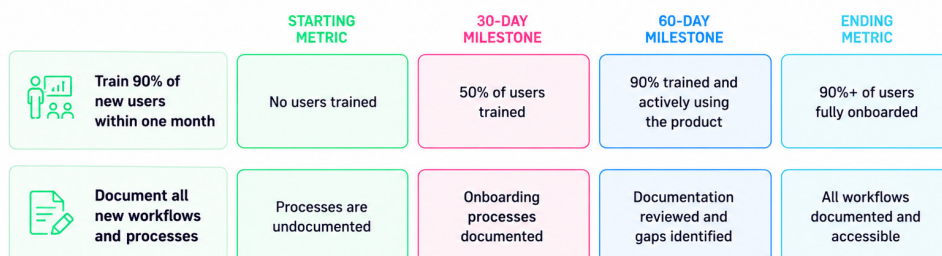
"I want to sell my firm in three years" doesn't belong in a success plan as-is. Translate it: "document all workflows so any role can be handed off cleanly by the end of onboarding." That translation is the work customers can't do for themselves, and it's what makes the engagement feel like it's in service of their business.

They know the outcome they want. Your team connects it to behaviors, workflows, and milestones they can actually execute. A decision-maker and a day-to-day user define success differently. Set goals for both.

3. Measure against milestones and mark when it's done

You can't demonstrate value for what you didn't measure. For every goal, define a start metric, a 30-day check, a 60-day check, and an end metric, then show customers how they're tracking. The biggest pattern Hayer sees is onboarding fading quietly into CS with no moment of completion. Mark it. Show what changed. That's your proof of value and the launchpad for what comes next.

Measuring Outcomes During Onboarding



In your next kickoff, ask the customer one question: how did you sell this internally, and what did you promise your CEO? Their answer is your first goal.

How to keep outcomes compounding after go-live



Anuj
Arora

Chief Customer Officer &
AI GTM Advisor



When Anuj Arora's team rebuilt Ada's contact center AI from a scripted chatbot to a fully agentic one, they migrated 250 accounts in six months. Resolution rates jumped 30%.

Then, thirty to sixty days post-launch, everything flatlined. His diagnosis: they had prioritized speed over depth, getting customers live and moving on before the outcome had a chance to compound.

Here are the three things he rebuilt to make sure the flywheel keeps spinning after go-live.

1. Build the blueprint before you build anything else

Ada found that customers who treated AI as a capability they needed to build internally saw far better results than those who treated it as something a vendor would deliver for them.

To make that expectation explicit, Anuj's team created a blueprint covering three dimensions: people, process, and technology.

The blueprint became the foundation for every customer conversation. Before discussing new features or use cases, the team assessed whether the conditions for long-term success were actually in place.

2. Use a maturity model to set the standard at every QBR

The blueprint only works if customers can see where they stand. Anuj's team created a four-level maturity model, from foundational adoption to organization-wide transformation. Every QBR started with the same question: where are we today, and what would it take to move up a level?

The pattern was consistent. Customers operating at higher maturity levels delivered stronger business outcomes, expanded more often, and generated significantly higher ROI.

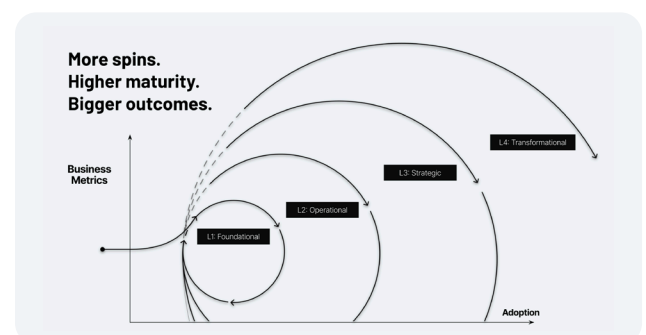
One customer moved from operational adoption to executive-level transformation in four months after securing C-suite sponsorship. The result: 943% ROI and a 30%+ increase in net revenue retention.

3. Start the outcome flywheel in PS, don't leave it to CS

Traditional implementations optimize for go-live. The customer reaches a basic level of adoption, gets handed to Customer Success, and the next phase becomes someone else's responsibility.

Ada moved to a different model: onboard, test, coach, scale. Each cycle increases customer maturity and creates momentum for the next one. Because PS has the customer's full attention during implementation, it's the best opportunity to establish those habits.

If customers leave implementation before the flywheel starts spinning, Customer Success is often left trying to create momentum from scratch.



Pull your last five handoffs. Where did each land on people, process, and technology? If you can't answer, your CS team is flying blind.

Three steps from portfolio gut feel to automated project health



**Grace
VanderMolen**

Program Manager

onesource
VIRTUAL



**Russell
Pope**

Technical Program
Manager

onesource
VIRTUAL



**TJ
Clark**

PMO Director

onesource
VIRTUAL

When OneSource Virtual moved to Rocketlane in April 2025, the portfolio data looked healthy: green projects, limited escalations, no major fires. But healthy according to whom? With 27 PMs running 150 active projects, every PM was defining health differently.

Some projects marked green had broken dependencies, tasks without owners, and milestones misaligned to go-live. The data wasn't lying. It just had no shared standard to measure against.

Here is how Grace, Russell, and TJ built one.

1. Test the framework manually before you automate anything

Before building anything, Grace spent five weeks manually reviewing 211 active projects, looking for broken dependencies, tasks without owners, milestones misaligned to go-live, and health statuses that didn't match reality. The goal was to define what healthy actually meant, so the same standard applied across every PM on the team. That framework became the spec for what came next.

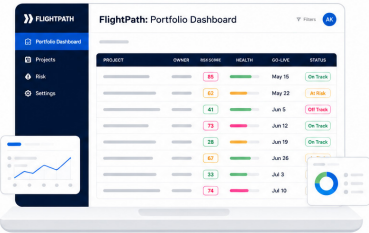
2. Build the scoring layer that makes the health objective

Russell built FlightPath — a custom app embedded in Rocketlane — to automate what Grace had done manually. Every project now receives the same

objective risk score, weighted by priority, updated in real time. Go-live is no longer confirmed when a PM checks a task: it's confirmed when payroll actually processes, pulled from external systems. The score is independent of what any individual decides to write in the status field.

3. Turn the score into a coaching standard

TJ runs 27 PMs across 150 active projects. The value of FlightPath goes beyond the dashboard to what happens in the one-on-ones. The most useful moment is when the automated score diverges from what a PM reported: tasks overdue, milestones missed, but still green. That divergence is the coaching conversation — the place where the team learns to see what they've been overlooking.



FlightPath is a Rocketlane embedded app built with a React 19 + Tailwind frontend, powered by Node.js server actions and Rocketlane's SDK/API layer.

React Tailwind Node.js Rocketlane SDK / API

Without FlightPath

- Manual review of every project for portfolio health
- Risk was gut-feel — no consistent scoring
- Data quality depended on PMs to update fields
- Go-live had no standard definition of "done"

With FlightPath

- Portfolio health surfaces automatically across all projects
- Every project gets an objective 0-100 Risk Score in real time
- AI suggests hygiene ratings; owners confirm with one click
- Go-live confirmed: first payroll run, first check delivered

Before you automate project health, define what healthy actually means. Pick five signals every PM should look for in the same way. That's the spec.

How Leaders Align Teams to Measurable Outcomes



**Mariah
Bayne**

Founder & Principal Coach



Most AI performance gaps don't come from the tool. They come from teams moving faster without moving together.

Mariah Bayne noticed that people were using AI to improve individual output without using it to stay connected as a team, creating a kind of misalignment that's hard to spot until it's already embedded.

Alignment isn't a feeling but a visible link between daily work and the goals it's supposed to serve, and without it, teams end up going faster toward the wrong finish line.

Here are three ways to catch it before the team gets there.

1. Run the five-question work stream audit with the team

Before any new initiative, run the work stream through five questions: What is this in plain language? What are people actually doing versus what they should be? Who does it serve? Where does AI touch it? What should be better, and how will you know? It surfaces what project plans miss: misaligned stakeholders, missing owners, and outcomes no one can trace to a real result.

2. Switch from task language to outcome language

Most team updates report activity, not impact. "We built the knowledge base," says a leader what happened. "We built the knowledge base and decreased ramp time by 20%," tells them why it mattered. That shift surfaces misalignment fast: if your team can't name the outcome their work is driving, the gap is already there, whether or not anyone has said so.

3. Give every update the same two-minute structure

When updates are too long or jargon-heavy, misalignment hides in plain sight. The SOAR framework — Situation, Obstacle, Action, Result — gives everyone a shared language for two-minute updates specific enough to surface disconnects. If someone can't say what changed as a result of their work, that's the alignment conversation to have.

The Task-to-Outcome Framework Cycle



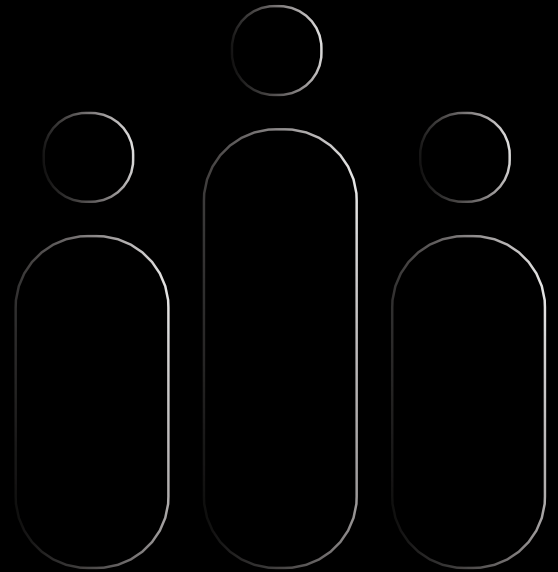
Take one active work stream. Ask three people on your team to explain it in a sentence, in plain language. If they say different things, that's where alignment work starts.



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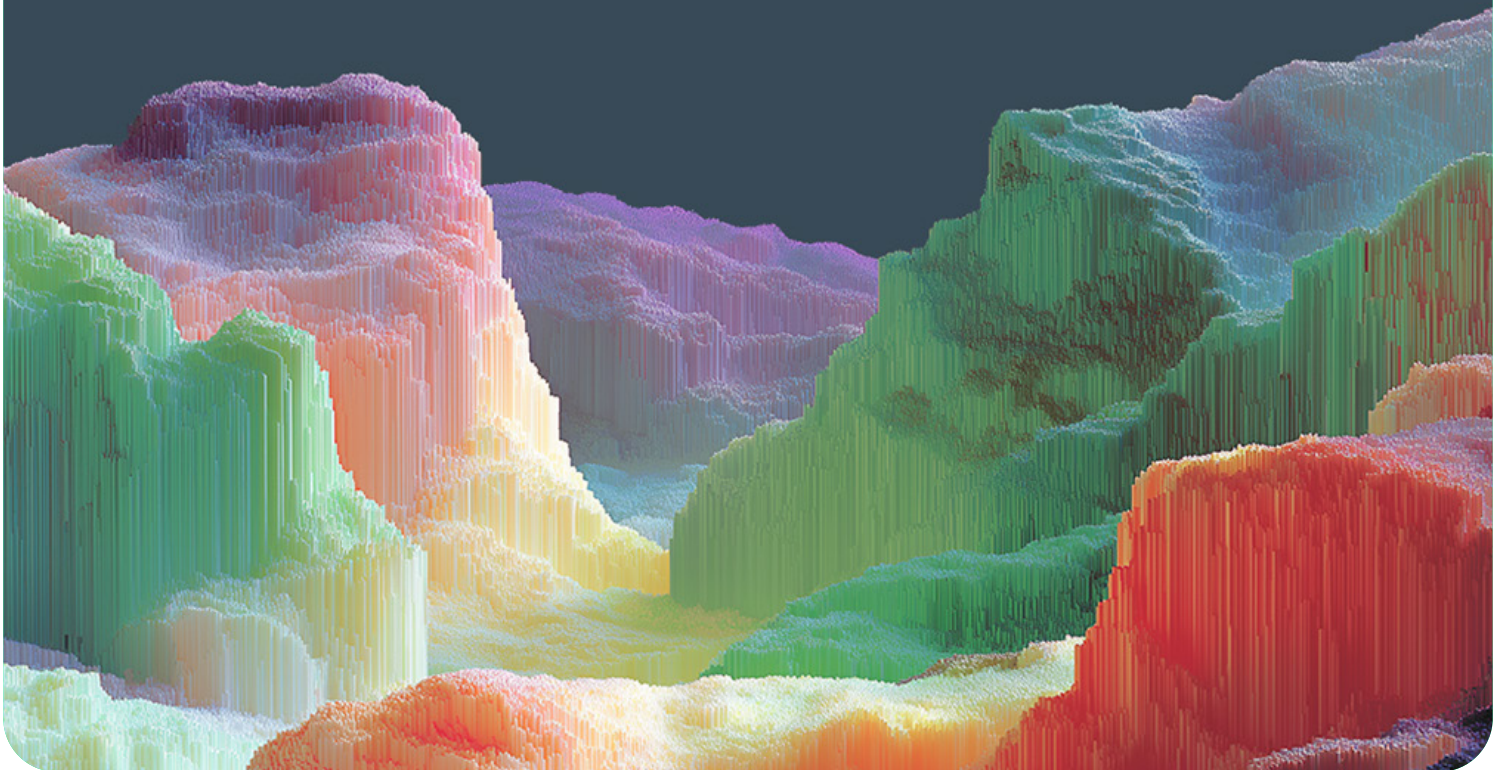
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06

Value-Based Pricing & Growth

How to price for outcomes instead of
hours and grow from there



How to move from order-taking to prescribing account growth



**Gwen
Thorn**

VP of Customer Success



**Kristen
Rosenberry**

Sr. PS Strategy & Ops
Program Manager



**Brett
Jarvis**

Vice President of Customer
Success & Experience



There are two versions of any PS role. In the first, you wait for the customer to identify a need, scope it, and deliver it. In the second, you already know what they need before they ask.

Professional services teams are traditionally trained for the first version. But at Moveworks, an enterprise AI platform, that model is over. Their delivery team arrives at accounts with a catalog of proven outcomes and tells customers what to build next.

Here is how they made that shift, and what it changed about how they price and grow.

1. Arrive at accounts with proven use cases, not a blank intake form

Moveworks built a Customer Engagement program where FDEs arrive at accounts with curated examples of high-value use cases, PO approvals, onboarding automation, seller collateral generation, proven by similar customers. The question is no longer “what do you need?” It’s “what a company like yours unlocked?”

Customers only have to recognize themselves in the right use case.

2. Rethink what margin means when consumption is the model

Moveworks moved from chasing 10%+ PS margins to targeting cost neutrality. Every use case FDEs implement drives platform consumption, allocates a share of that back to the services’ P&L, and margin neutrality becomes the right commercial target, not a failure. If your pricing model is still built on hours billed, you’re measuring the wrong thing.

3. Don’t stop at the first champion

A successful implementation that stays in one department is the biggest renewal threat you have. You start in IT; you need to get to finance. The original champion can’t carry it alone — they can introduce you to the next problem, but only if you’ve gone deep in the account before you need to. Build a network of people who know what you delivered and can bring you to where the growth actually is.

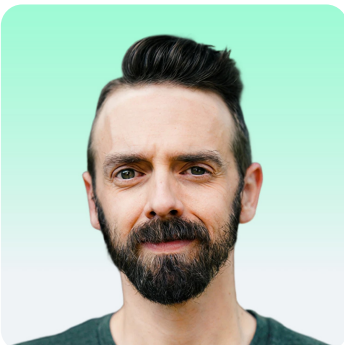
In your next account review, lead with one use case another customer like them has already proven. See how the conversation changes.

How to move from selling hours to selling outcomes



**Erin
Vaughan**

VP of Customer Services



**Jess
Williams**

Director of Professional Services



For years, the unspoken currency at dbt Labs was hours. It showed up in how the team scoped work, how they talked to sales, and how customers described what they were getting.

Nobody decided this; it just accumulated. By the time Erin Vaughan and Jess Williams started asking what the team was actually selling, hours had shaped so much of the downstream thinking that changing the answer meant rebuilding almost everything that followed from it.

Here is what they learned through the iterations and the model they finally landed on.

1. Collapse your SKUs until the conversation is simple

dbt Labs went through five iterations before landing on one: two-week sprints became a bucket of hours, which became eight pricing tiers, which became two, which became one — Resident Architect Access. Each change solved the problem in front of them and created new ones. Eight tiers meant eight delivery mechanisms, messy revenue reconciliation, and a sales team drowning in options. By 2025, they had collapsed back to one offering, one conversation, one way to win.

2. Keep hours internal — sell access, not time

The RA Access SKU still tracks hours internally, but hours never enter the customer conversation. They are the scheduling mechanism, not the

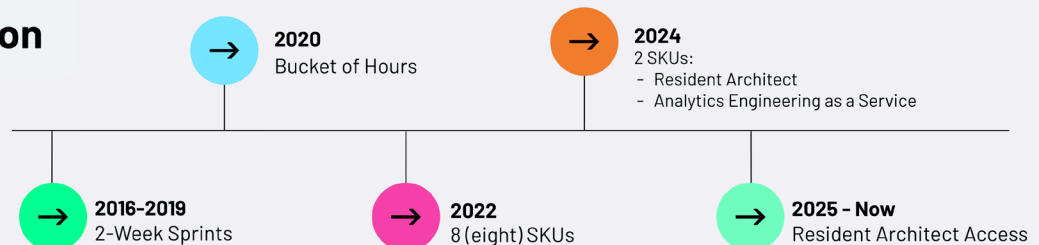
value proposition. What customers buy is access to expertise for a fixed period, which means the conversation shifts from defending a burn rate to building on what was accomplished. That is a different relationship entirely.

3. Simplify the operating model so your AI can work

AI amplified what dbt Labs had already simplified.

dbt Labs built four custom apps on Rocketlane in eight weeks — including a project hours forecast with AI-generated pace recommendations and customer-facing talking points specific to each project, not generic advice. The results: 9% utilization increase, 52% year-over-year logo attach, 100% attach on Q1 target accounts, zero post-kickoff change orders, month-end close in two days.

SKU-volution



Identify one active engagement where hours are the main customer conversation. Reframe the next check-in around outcomes instead. Run that once.

Three ways to build a partner delivery program that actually works



**Sabina
Pons**

Chief Executive Officer &
Chief Customer Officer



**Justin
Manduke**

Vice President of
Professional Services



**Josh
Simpson**

SVP of Professional Services



When you launch a partner program, you are not adding a new capability; you are amplifying everything you already have, including the gaps.

The organizations that have built mature programs all figured out the same thing: partners cannot be treated as an external channel. They have to be brought inside.

Here are three things the panelists learned the hard way about making that work.

1. Fix your internal enablement before you recruit a single partner

The moment you bring partners in, your enablement gaps become their problem, your product bugs go global, and your pricing inconsistencies show up at customer sites with your logo on them. Treat partner enablement with the same rigor as internal enablement — before launch, not after. If you wouldn't send your own team in with that training, don't send a partner.

2. Build trust before you build the playbook

Gainsight invited partners to its sales kickoff for the first time this year. When a mix-up threatened to undercut the gesture, Josh Simpson made two calls and fixed it in an hour. That's not a story about systems, it's about trust. The companies getting the most from partner relationships are the ones where partners can text when something's wrong, and both sides row in the same direction.

3. Don't wait for the perfect partner program

Pick an emerging market or smaller product — something that won't break the business if a partner doesn't nail it. Josh's approach when he joined Gainsight: re-engage existing partners, set honest expectations about what wasn't ready, and make it a company focal point anyway. Starting before everything is figured out is what gives a partner program a real foundation to grow from.

Before you recruit your next partner, ask: Would I send my own team in with the training and enablement we're giving them? If the answer is no, fix that first.

How to earn expansion through deep business understanding



Kasey
Smith

Chief Operating Officer

graphite Connect

Graphite Connect's first customer started at \$200K in ARR. By the time the account reached \$750K+, there hadn't been a formal upsell motion.

The growth came from what Kasey Smith calls “deep business understanding”—knowing a customer's goals, constraints, and challenges so well that you can spot opportunities before they do. When that level of expertise is built, expansion stops feeling like a sale. It becomes the obvious next step.

Here is how they built that depth, and what it changed about the way they hire and grow.

1. Win the expansion during implementation and not at renewal

Most PS orgs believe expansion happens at renewal or when sales re-engage. Graphite found that its largest expansions started during implementation, when new stakeholders entered the conversation, hidden constraints surfaced, and the team gained a deeper understanding of how the business actually operated.

Deep business understanding is knowing the constraints, anticipating the problems before the client names them. That's where the relationship actually changes.

2. Invest in domain depth, not just delivery capacity

Customers buy outcomes, not tools. AI increases both platform power and implementation complexity, which means high-touch delivery isn't being automated out; it's becoming more valuable.

The teams that earn trusted expert status, where clients stop asking “should we?” and start asking “can you?”, are the ones that invested in domain depth rather than delivery headcount.

3. Become the expert clients call before they make decisions

Graphite's arc: \$200K ARR, single customer, standard implementation. Three years later: \$750K+ with the same account, no upsell motion.

What changed was depth, from configuring what was sold to advising on what should happen next and where expansion opportunities emerge. Graphite's approach was simple: hire people who've done the customer's job before and train them to understand how the business works, not just how the software works.



On your next engagement, ask: Do we understand this customer's business well enough to identify what they need next before they ask?

How to close the customer trust gap in outcome-based pricing



Sarah
Hurd

VP, Services & Operations



When you pay for a result and receive a process, something has gone wrong, even if nothing technically did.

The trust gap is the distance between what a customer believes they're paying for and what they believe they actually received. In outcome-based pricing, that gap expands when the outcome itself is unclear, and Sarah Hurd's argument is that most of the expansion is self-inflicted. PS teams scope defensively, measure what's easy, and count go-live as time-to-value before anyone has adopted the platform.

Here is how she diagnoses the gap and what to fix before you reprice anything.

1. Acknowledge how both sides contributed to the trust gap

Vendors have historically measured what is easy to count, not what customers actually care about. Chatbot resolutions that included abandoned conversations. Uptime SLAs are met on systems too slow to use. Go-live marked as time-to-value before anyone had adopted the platform. But customers arrive without baseline data, often unable to define what a successful outcome would even look like in measurable terms. The trust gap exists because both sides built it. Closing it requires both sides to own that.

2. Understand why outcome pricing is now a buyer expectation

AI has changed what buyers expect from services. Implementations are faster, budgets are tighter, and effort no longer maps cleanly to value delivered. SaaS pricing has already shifted buyers toward usage-based models, so when they come to a services conversation, outcome-based pricing is the reference point they bring with them.

Experienced buyers, now supported by AI in their own purchasing decisions, are asking for guarantees. The question is not whether outcome-based pricing is coming. It is whether your team has the infrastructure to deliver on it.

3. The readiness test before repricing anything

Before changing your pricing model, answer four questions honestly:

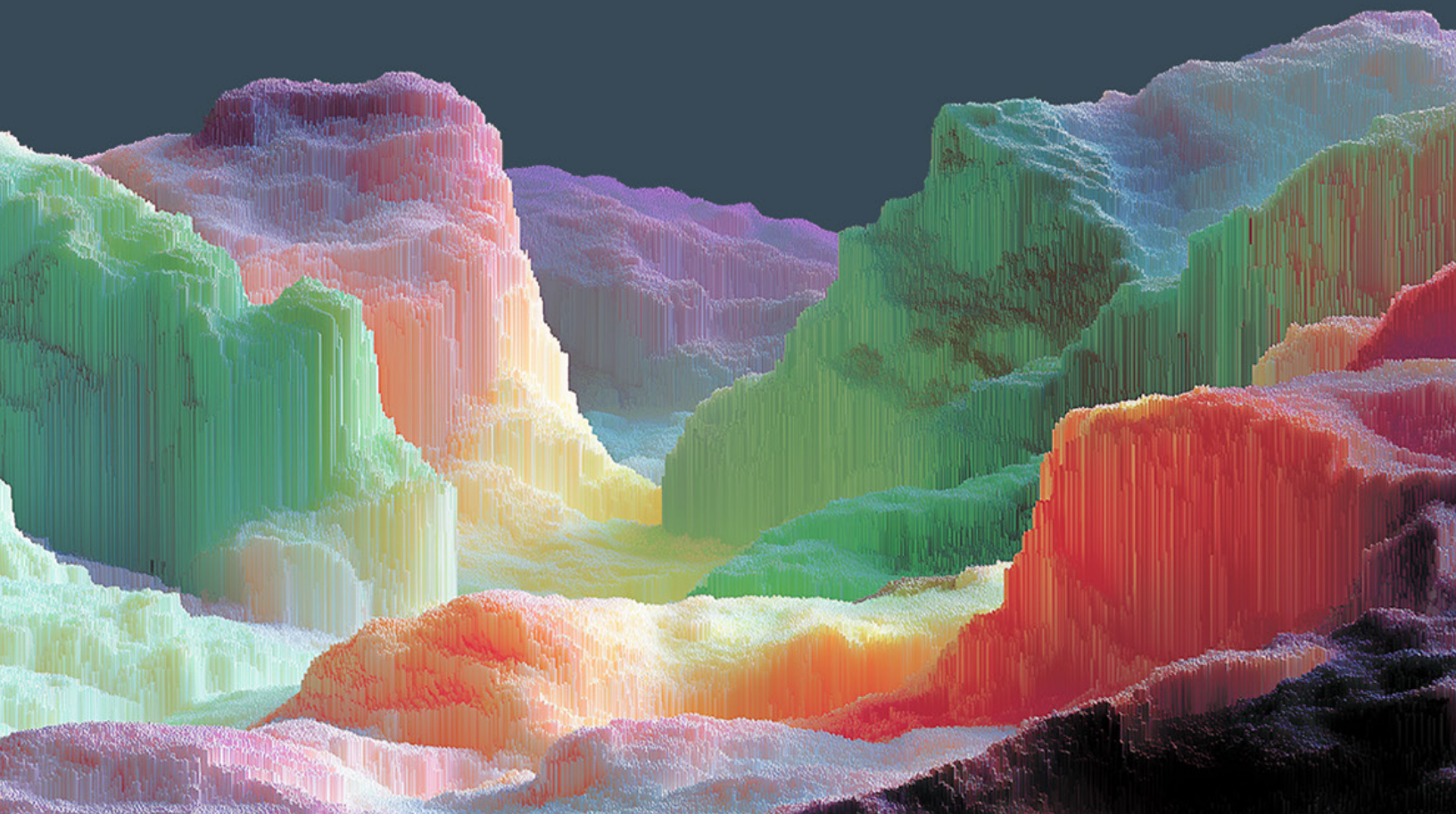
- ◆ Can you do fixed fee reliably and profitably?
- ◆ Do you collect post-go-live adoption data?
- ◆ Do you have outcome benchmarks in your domain?
- ◆ Can you define the outcome in one sentence that both sides would sign?

If any answer is no, that is where to start. For teams not yet ready to go fully outcome-based, Sarah offers three hybrid paths: fixed fee with an outcome review built in, an ongoing engagement tied to outcomes, or a subscription model embedded in the product.

On your next engagement, define the outcome in one sentence that both sides would sign, before the SOW is finalized.

Epilogue

Outcomes are
rewriting what
delivery means



Across all sessions, one question was underneath everything: what does PS look like when outcomes become what customers are actually buying?

What struck us most about Propel 26 was how often people arrived at the same conclusion from completely different directions.

It came down to finding answers across different business goals – pricing, implementation, adoption, customer success, project health, or expansion. But underneath all of it was the same shift.

For years, our industry optimized around delivery. Projects completed. Milestones achieved. Go-lives celebrated. Those things still matter. But they're increasingly becoming milestones on the journey rather than the destination itself.

The organizations pulling ahead are operationalizing outcomes. They're defining them earlier, measuring them more consistently, building them into how projects are run, how teams are structured, how customers are onboarded, and how value is proven long after implementation ends.

That's where AI showed up most often in these conversations, as the infrastructure that makes outcomes visible, measurable, and scalable.

We're grateful to every speaker who shared not just what's working, but what's still being figured out. To our customers, partners, and sponsors—thank you for making Propel what it is.

If there's one thing this year's conversations made clear, it's that there has never been a more exciting time to rethink how professional services create value.

The playbook is still being written. New roles are emerging. New business models are taking shape. Teams are finding new ways to connect delivery to measurable outcomes. We are further ahead in the journey than a year ago.

The organizations that will lead the next era of professional services are the ones already rebuilding around outcomes, already operationalizing what value looks like, and already asking harder questions about what delivery is actually for.

We'll meet again next year. Until then, write to us at propel@rocketlane.com. We want to hear what you tried, what worked, and what you're building next.

— **Srikrishnan Ganesan**
CEO & Co-founder, Rocketlane

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